Content Publishing

Content Publishers are the users who create and manipulate content within the system. Their job is to manage the information. The Content Publisher’s view is really an extension of the user’s My Portal view, in that elements of the content managed in Content Publishing mode can be viewed and extended through the My Portal interface. By default, all My Portal users are Content Publishers; however, access controls set by other Content Publishers or the Administrator may limit their capabilities and access within the content.

The InfoPortal Database is arranged in most installations by Category. Each of these categories corresponds to a folder on the Document Root of the server. Documents may be stored within each of these Categories by their sub-type. For example, a company that has operations in many countries may have their categories segmented out by the country, with sub-categories within each country for various types of documents (reports, travel brochures, etc.). The Category model allows quick sorting of documents and objects within the system so that users can easily find items via a simple drill-down process, or via search. (This is covered more specifically in the Overview of this document). The Content Publisher has the ability, where assigned by the Administrator or other Content Publishers, to modify both the folder and category structure of the system, as well as the files within those categories.

In addition, InfoPortal allows the storage and search of “metadata,” or information about each document or item in the repository. These are customized by the system Administrator for each implementation of InfoPortal. However, the basic idea is constant—information about the item that may or may not be available in the document itself can be stored *with* the document and searched upon.

This section of the User’s Manual contains a set of functional overviews (pages 3.2 to 3.15) followed by step-by-step how-to information for each function. The overviews for each function include reference pages to the full function explanation in later pages.

Content Publishers can use InfoPortal’s browser interface and point-and-click tools to:

- Add and delete folders and files as set by the Administrator or other Content Publishers
- Make PDF Renditions (Acrobat copies) of uploaded documents
- Check In and Check Out versions of documents and view the previous versions of those documents
- Check and modify Access Control (document- and file-level User and Group access rights)
- Set, modify and delete Agents, which can notify both users and groups of specific events within the content of the system
- Convert and OCR scanned documents (in TIFF format) to Adobe Acrobat PDF (with optional Glyphica Satellite server)
- View, update and edit file and folder metadata
- Search by full-text content and associated metadata

Logging In

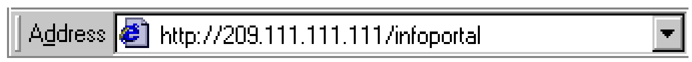
Note

The startup address for Solaris machines is case-sensitive. To access a Solaris machine, enter
http://machinename/infoportal
where infoportal is all lowercase. Using capital letters anywhere in the name will cause startup to fail.

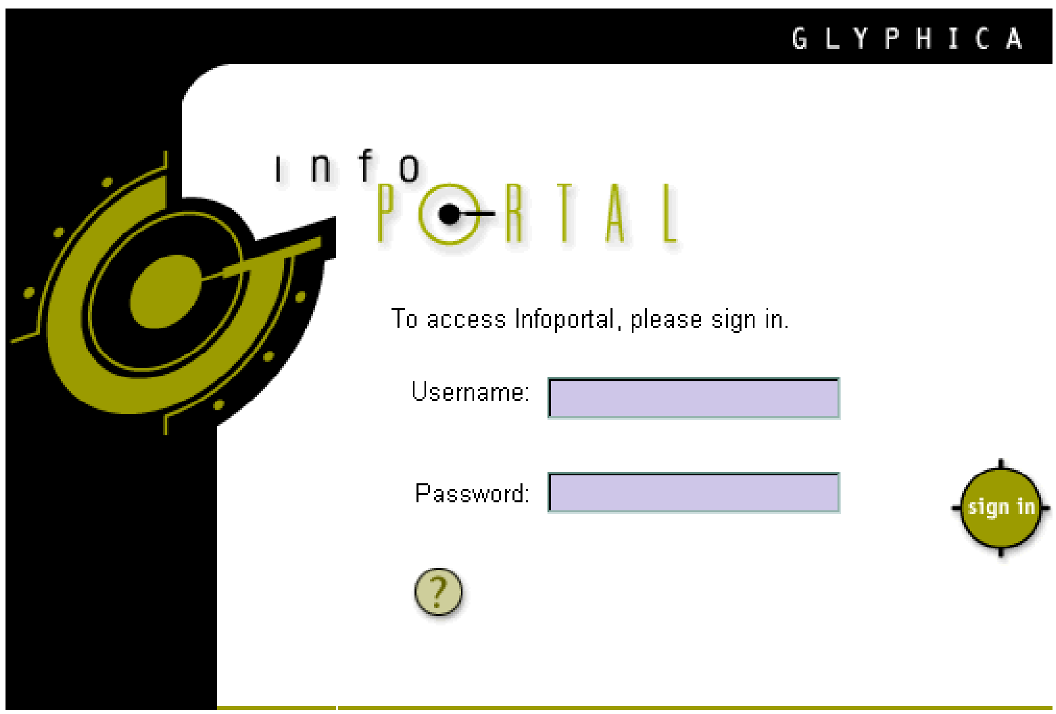
1. Start InfoPortal by opening your Internet browser.
2. Enter the following URL, replacing [machine name or IP address] with either the hostname or IP address of the InfoPortal server:

   http://[machine name or IP address]/infoportal/

   - Of the following examples, the first illustrates the Netscape interface and the second, Internet Explorer:

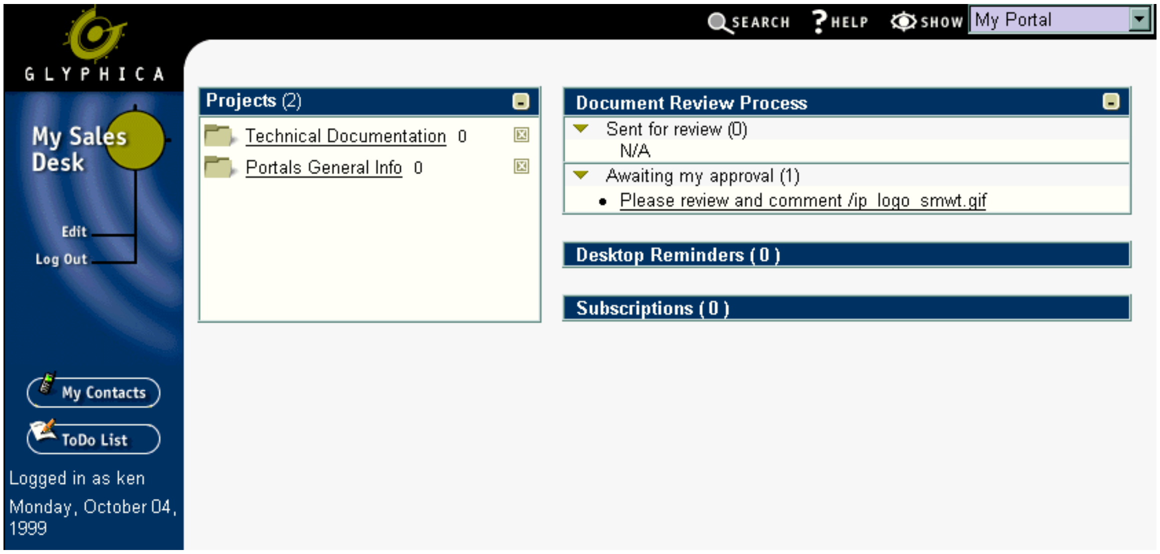


   - The Login screen displays:

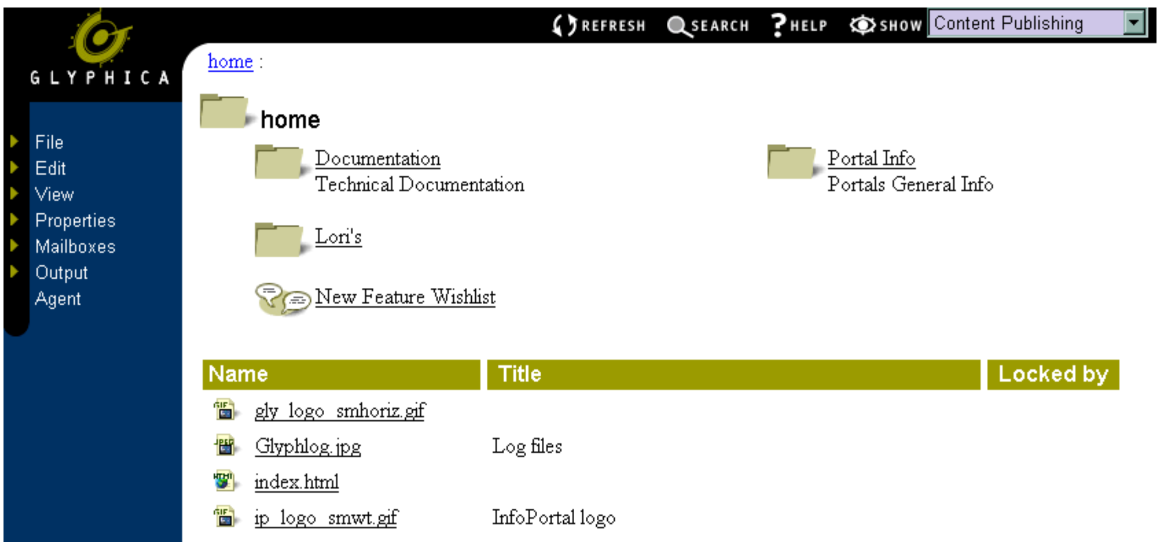


3. Enter the username for your profile and press the Enter key.
4. Enter the password for your profile and press the Enter key, or click on the Sign In button.
   - This will start your InfoPortal session.
   - If you need additional help with this screen, click on the question mark icon located below the word “Password”.

- The My Portal view displays:



5. Select Content Publishing from the Show menu.
   - The Content Publishing view displays:



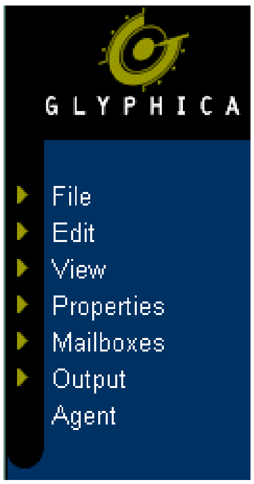
Interface Description and Functional Overview

The Content Publishing view contains the following areas:

- Side Navigation Bar
- Top Navigation Bar
- Content Area

Content Publishing Side Navigation Bar

The Side Navigation Bar is located on the left-hand side of the Content Publishing screen.



The Side Navigation Bar contains the following main menu items:

- File
- Edit
- View
- Properties
- Discussions
- Mailboxes
- Output
- Agent

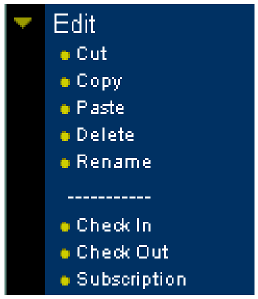
Menu items that contain a submenu display a green triangle to the left of the menu name.

The following tables list the menu links in the Side Navigation Bar, a description of the function of each link, and where you can find the related tasks for step-by-step instructions.

File Menu

Menu Item	Description	Associated Tasks
New	Lists the items you can create in InfoPortal.	
• Category	Displays the Add a Category screen, where Content Publishers can create a new category folder in the InfoPortal.	• "Creating a Category Folder," page 3.17
• Topic	Displays the New Topic screen, where Content Publishers can post messages to an existing discussion group.	• "Creating a New Discussion Topic," page 3.18
• Review	Displays the Document review screen where Content Publisher can send a document to be reviewed by other users	• **
• Subscribe	Displays the subscription screen where Content Publishers can subscribe to content within InfoPortal	• **
Add		•
• Document	Displays the Add a Document screen, where Content Publishers can upload a document to the InfoPortal.	• "Adding a Document," page 3.23
• Weblink	Displays the Add a Weblink screen, where Content Publishers can set up a link to a remote website.	• "Creating a Web Link," page 3.26
• to Projects	Allows InfoPortal to add a selected document or folder to the Projects box on MyPortal	•

Edit Menu



You must select a folder or document in the Content Area before clicking on the edit menu link. If you do not select an item first, you will get an error message similar to the following:

Menu Item	Description	Associated Tasks
Cut	Moves folders and files from one location to another. Cut does not take effect until Paste has been performed.	• "Cutting a Document or Folder," page 3.26
Copy	Places a copy of the folder or document in memory for pasting elsewhere in the Portal. The folder or document also remains in the current directory. The new document will not have the security settings and agents that were assigned to the original document.	• "Copying a Document or Folder," page 3.26
Paste	Places the document or copy of the document, after cutting or copying, in the current directory. While you can perform multiple paste operations from one Copy operation, you can only perform one paste after a Cut operation.	• "Pasting a Document or Folder," page 3.27
Delete	Removes the folder or document from the InfoPortal. You cannot delete a document that is under version control. Also, you cannot delete a folder that contains a version control document.	• "Deleting a Document or Folder," page 3.27
Rename	Displays the Rename screen, where Content Publishers can change the name of a selected document or folder. You must select the document or folder icon before selecting Rename.	• "Renaming a Document or Folder," page 3.27
Check In	Displays the Check In screen, where Content Publishers can check in a new version of a selected document under version history.	• "Checking In a Document," page 3.29

Menu Item	Description	Associated Tasks
Check Out	Displays the standard file download screen, where Content Publishers can save the file to the local system. The file is locked on the server under version history until you or the Administrator unlock it or check it back in. Content Publishers must select the document icon before selecting Check Out.	• "Checking Out a Document," page 3.28
Subscription	Displays the Notifiction Type screen where the user can change the subscription notification method or can unsubscribe to the document or folder.	• *"Subscribing to a Document or Folder," page 3.75*

View Menu

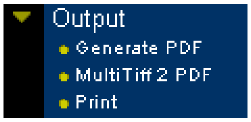
Menu Item	Description	Associated Tasks
List	Displays folders and documents in a double column. The original document icon is located to the left of the file name, the PDF icon is to the right, and the document title is below the file name.	• "List View," page 3.32
Report	Displays folders and documents in a single column with the headings Name, Title, and Locked by. The original and PDF file icons both display to the left of the document name. The document title displays to the right of the document name. This is the default view.	• "Changing the Document Report View," page 3.32
Site	Displays the directory structure in a hierarchical view, much like the Microsoft Windows Explorer's left pane. Each directory title is a link to that Category folder.	• "Viewing the Site Map," page 3.33
Discussions	Displays a list of current Discussion Groups on the InfoPortal. The list items are links to the discussion groups.	• "Viewing a List of All Discussions," page 3.63

Properties Menu

You must select a folder or document in the Content Area before clicking on the menu link. Cut does not take effect until Paste has been performed. Cut effectively permits you to move folders and files from one location to another, transferring agents and security for the document in question. If you do not select an item first, you will get an error message similar to the following:

Menu Item	Description	Associated Tasks
General	Displays the Document Properties screen, where you can add, change, or delete metadata for the selected document or folder. You can also manually lock/unlock the item from this screen. In addition, the creation and last modified dates display here. Also, the size information, and the created-on and last-modified dates (extracted from the server's operating system) display here.	• "Adding, Changing, and Deleting Document or Folder Attributes," page 3.39 • "Manually Locking/ Unlocking a Document or Folder," page 3.41
Security	If you selected a document, the File Permissions screen displays. If you selected a folder, the Directory Permissions screen displays. In both screens you can view the current permissions. You can also add, change, or remove permissions from these screens.	• "Adding File Permissions," page 3.46 • "Changing File Permissions," page 3.50 • "Removing File Permissions," page 3.51 • "Adding Category Permissions," page 3.52 • "Changing Directory Permissions," page 3.57 • "Removing Directory Permissions," page 3.58
Check Links*	Displays the Link Information for the selected file or Category folder, where you can verify the hyper links in PDF and HTML files for targets both within a document and outside the document. ** This menu option does not apply to weblinks.*	• "Checking PDF and HTML Links," page 3.59
Version History	Displays the Version History screen, where you can view multiple versions of the same document. You can also delete older file versions from this screen. Note that a new version is automatically created when a document is moved from its original location. ** This menu option does not apply to weblinks.*	• "Viewing Document Version History," page 3.60 • "Deleting an Older Document Version," page 3.61

Output Menu



The Generate PDF link allows Content Publishers to make PDF Renditions of existing documents of many formats. If the document was not Renditioned during the Add Document process, it may be converted manually to PDF format using this tool.

In addition, InfoPortal allows the conversion and Optical Character Recognition (OCR) of scanned paper documents in TIFF format. Content Publishers may scan documents directly into an InfoPortal Category folder, then use MultiTiff2PDF to set the order of the documents, run OCR against them, and make machine-searchable Image+Text Adobe PDF documents.

The Print link allows server-side printing. Content Publishers can choose a particular document, or set of documents in a folder, and request InfoPortal Server to print the documents to a network-attached or hardware-attached printer.

You must select a document in the Content Area before clicking on the menu link. If you do not select an item first, you will get an error message similar to the following:

Menu Item	Description	Associated Tasks
Generate PDF	Automatically generates an Adobe Acrobat PDF, fully-text-searchable document from a selected file. You can select only one item at a time for this function (multiple file selection is not allowed).	"Generating a PDF Rendition," page 3.71
MultiTiff2 PDF	Automatically generates a machine-searchable PDF document from single or multiple TIFF files. Use this method to convert scanned paper documents.	"TIFF to PDF Conversions," page 3.71
Print	Displays the Print Files screen, where you can select the order of printing, select a printer, the number of copies, and print the selected document(s).	"Printing a Single Document," page 3.73

Agent Menu

Agents allow Content Publishers to set complex search- or criteria-driven notifications on categories or individual files within the InfoPortal, and send those notifications to specific users and/or groups, or to their own myportal windows.

You must select a folder or document in the Content Area before clicking on the menu link. If you do not select an item first, you will get an error message similar to the following:

Menu Item	Description	Associated Tasks
Agent	Sets up automatic notification when certain events occur. InfoPortal can notify you either by email or My Portal. Events you can select: • Created (does not apply to Discussion Topics) • Modified (does not apply to Discussion Topics) • Deleted • View (agent not triggered by opening a Discussion)* • Modified links • Checked links • Email arrived • Copied • Moved	• "Agent Overview," page 3.77 • "Editing an Agent," page 3.85 • "Enabling/Disabling an Agent," page 3.86

* When you set a View Agent on a document that opens *within a frame,* you do not receive notification on your My Portal desktop or through e-mail, unless you manually reload the frame that the document is in EVERY time you view it. Typically these documents are cached (unless you change the cache preferences setting for your browser), and if viewed a second time without refreshing, they will be pulled from the cache and will not trigger another event. On the other hand, documents that open *in a new browser window* trigger an event every time because the document is requested from the system again rather than from cache.

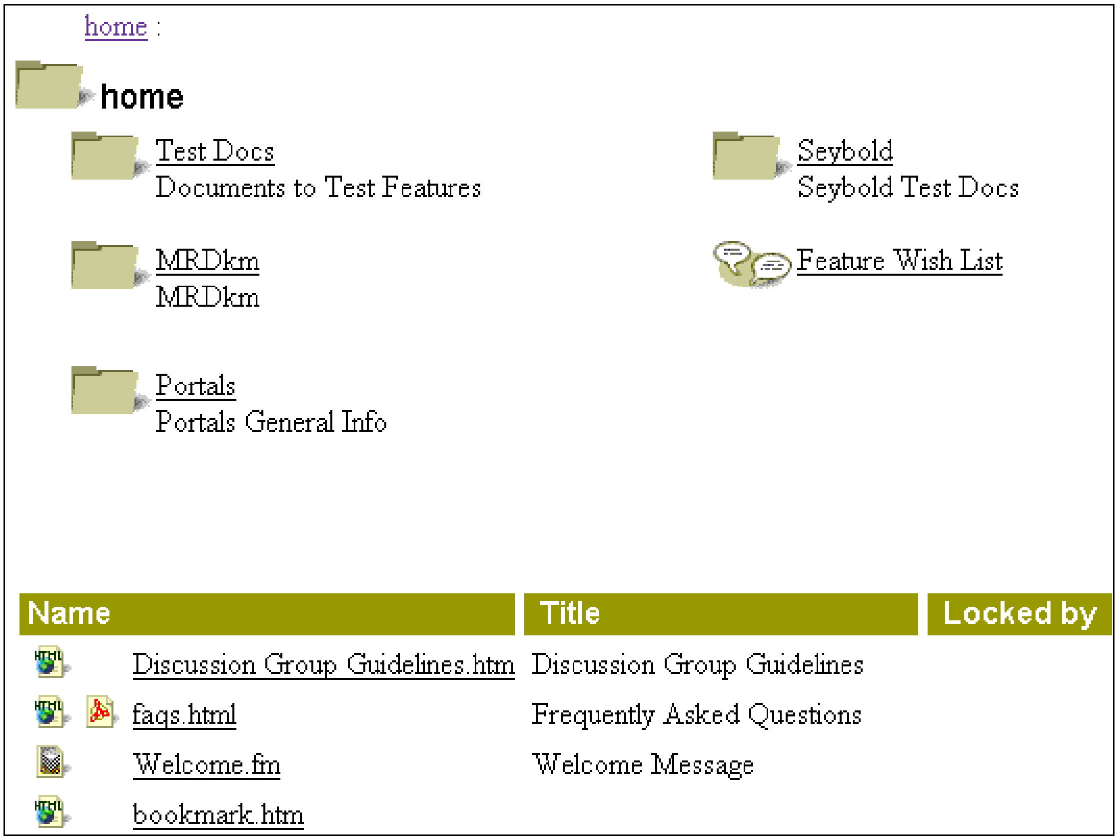
Top Navigation Bar

See "Top Navigation Bar," page 1.3 for a description of the Top Navigation Bar.

An additional button displays in the Top Navigation Bar in the Content Publishing view. The Refresh button displays the most current data in the Content Area. Typically Content Publishers should click on Refresh after performing functions in which a document icon is selected first. This ensures that the icon is deselected.

Content Publishing Content Area

The Content Publishing Content Area is located to the right of the Side Navigation Bar and below the Top Navigation Bar.



The Content Area contains three elements:

- Directory Path
- Folder List
- Document List

Navigation Path

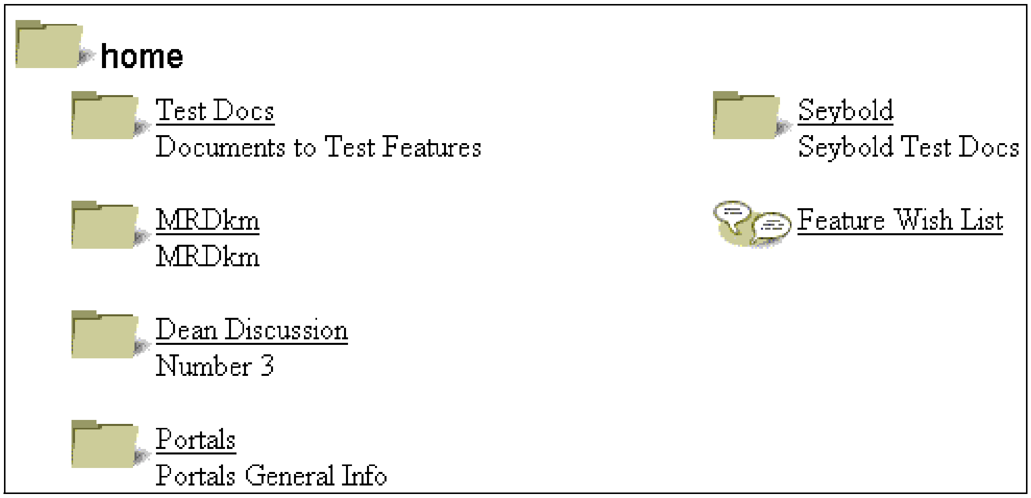
The Navigation Path shows the current directory and its parent directories in a horizontal line across the top of the Content Area.

home : Sales : Proposals : Fortune100 :

Each directory name is a link. You can click on any link to go immediately to that directory. For example, if you click on the home link, you go directly to the home directory.

Folder List

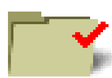
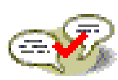
The Folder List is located below the Directory Path area and above the document list area. It contains all discussion document and group folders in the current directory.



The Folder List looks the same whether you are in List or Report view.

FOLDER ICONS

Examples of document, discussion and mailbox folder icons are shown in the table below:

Icon	Icon Selected	Explanation
		Document Folder
		Discussion Group
		Mailbox

FOLDER LINKS

To the right of each folder icon is an underlined title, which is a folder link. Clicking on the link displays the contents of the folder in the Content Area.

Document List

The Document List is located below the Folder List area. It contains all documents and weblinks in the current directory.

The Document List looks different depending upon whether you are in List or Report view.

Report View:

Name	Title	Locked by
Discussion Group Guidelines.htm	Discussion Group Guidelines	
faqs.html	Frequently Asked Questions	
Welcome.fm	Welcome Message	julie
bookmark.htm		

Elements of the Report View:

- Document type icon
- PDF Rendition icon, if any
- Filename
- Document metadata title
- If locked, by whom

List View:

Discussion Group Guidelines.htm
Discussion Group Guidelines

faqs.html
Frequently Asked Questions

Welcome.fm
Welcome Message

bookmark.htm

Elements of the List View:

- Document type icon
- Filename
- PDF Rendition icon, if any
- Document metadata title

Document Icons

Within document folders, document-type-specific icons show the original format of documents in the InfoPortal by displaying the industry-standard icons for these document types. Examples are shown in the tables that follow.

Adobe Acrobat Icons:

Icon	Explanation
	Adobe Acrobat PDF file is the only available format for viewing. The icon displays to the *left* of the document title.
	Adobe Acrobat PDF file has been created froma different format. The icon displays to the *right* of the document title, and is a supplementary link to the original document.

Icon	Icon Selected	Explanation
		Adobe Acrobat PDF file
		HTML document file
		Word document
		PowerPoint document
		Excel document
		Generic document such as text, zip, gtf
		GIF image file
		TIFF image file
		JPEG image file

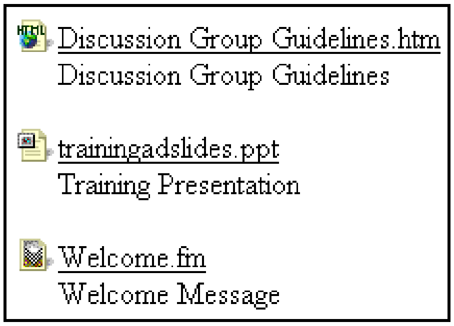
Document Links

To the right of each document icon is an underlined title, which is a document link. Clicking on the link displays the contents of the document in the Content Area.

Report View:

	Discussion Group Guidelines.htm	Discussion Group Guidelines
	trainingadslides.ppt	Training Presentation
	Welcome.fm	Welcome Message

List View:



Content Publishing Tasks

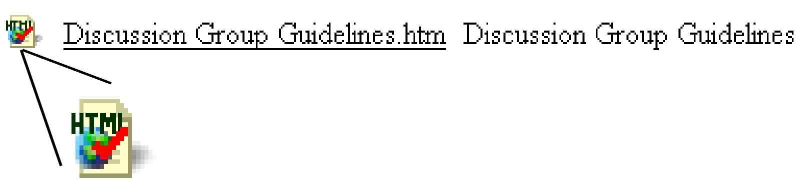
This section of the Users Manual details each of the functions of the Content Publishing mode of InfoPortal.

Adding an Item to your My Portal Window

This procedure places a link to the selected folder or document in a selected window of the My Portal view. (The folder or document remains in its original place in the InfoPortal). The MyPortal window is essentially a set of organized, categorized shortcuts to the content contained within InfoPortal. It is a “control panel” from which each user can customize views into the system, and make it easy to get to the content that is most important to that user.

This is a shortcut feature so you can access documents you are working on from the first screen after you log in. You can use this procedure for any My Portal window, except for Document Review Process, Desktop Reminders, and Subscriptions (these three windows are self-updating from other functions within the system).

1. In the Content Area, click on the folder or document icon to select it.
    - You can select multiple items.
    - A check mark displays on the icon.



2. In the Side Navigation Bar, click on the File menu triangle to expand it.

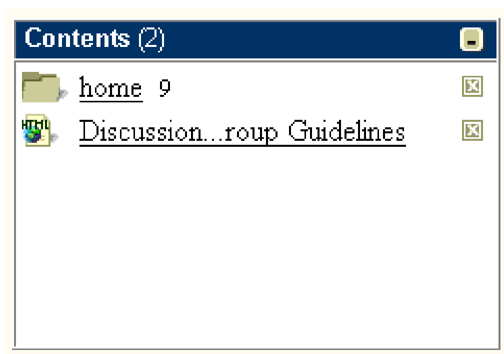
3. Click on the appropriate “Add to” link.

- Add to Contents is provided with InfoPortal; you may see additional links in the My Portal menu, depending on your particular installation.
- A confirmation message displays:

4. Click on the OK button.

5. Click on the Refresh button  to deselect the document icon in the Content Area.

- The folder or document now displays in the selected window of the My Portal view.



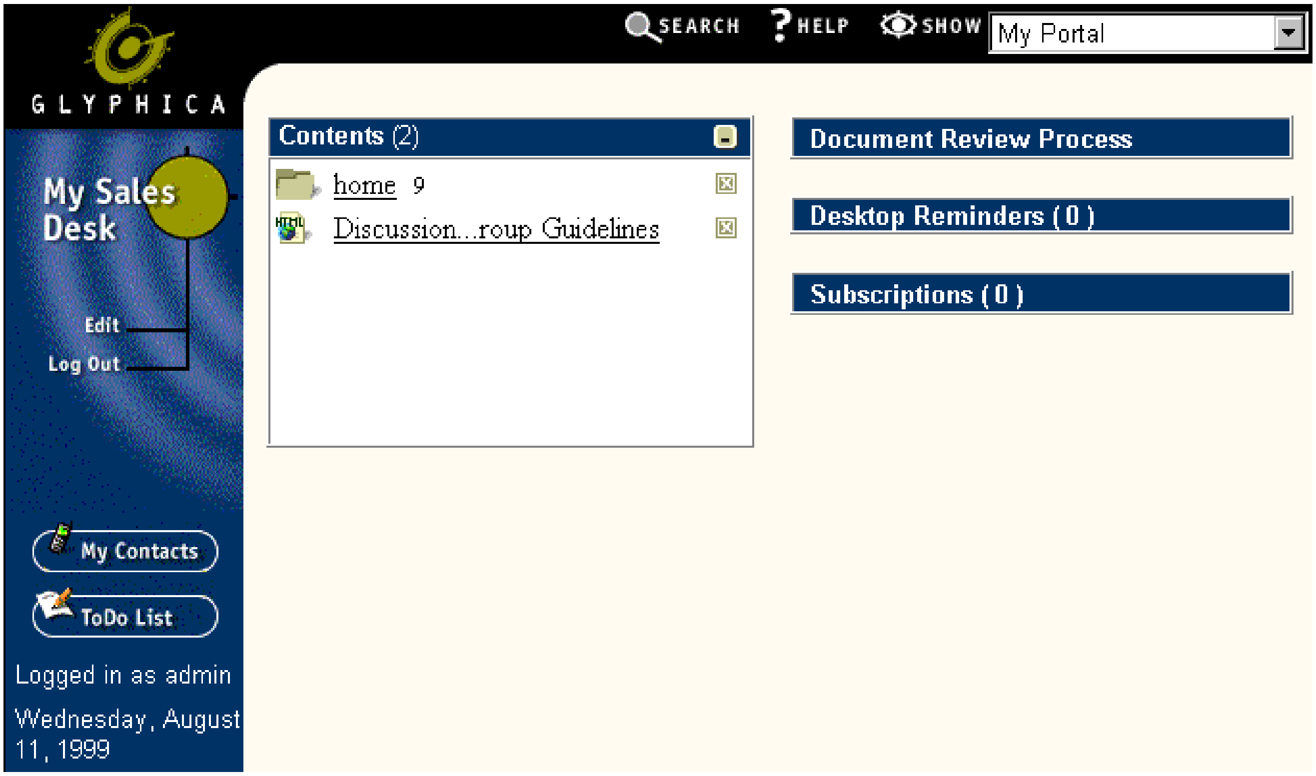
- The document title may be shortened due to window size (the window cannot be resized).

Deleting an Item from a My Portal Window

This procedure deletes the My Portal window shortcut for a folder or document. (It does not delete the original folder or document from its place in the InfoPortal). The figures show the Contents window, which is provided with InfoPortal; your specific installation may contain additional windows. You can use this procedure for any My Portal window, except for Document Review Process, Desktop Reminders, and

Subscriptions, which automatically update their contents based on other operations within the system.

1. Select My Portal from the Show menu drop-down list.
   - The My Portal view displays:



2. In the window that contains the shortcut, click on the ☒ to the right of the folder or document title you want to delete.
   - A confirmation message displays:

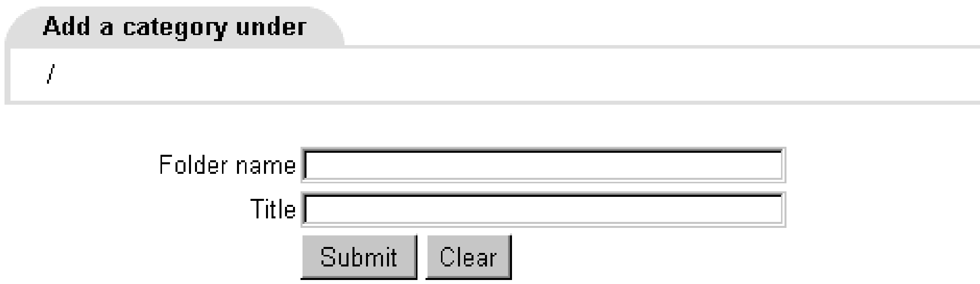
3. Click on the OK button.
   - The shortcut is removed from the selected My Portal window. It is **not** removed from the Portal content; only the shortcut to the folder or document is removed.

Creating a Category Folder

This procedure creates a Category Folder (directory) in the InfoPortal. The directory displays as a folder icon with a name that you provide. Use Categories to organize information within the system in a logical hierarchy. For example, if you have documents representing information concerning five clients, you may wish to make a Clients folder, with five subfolders, one for each client. InfoPortal's search functions will allow you to limit your searches within the Portal to this category and/or its subcategories.

(To create a Discussion Group Folder, see “Creating a New Discussion Topic,” page 3.18.)

1. Navigate to the directory where you want to create the Category Folder.
2. Click on the File menu; look under New.
3. Click on the Category link.
   - The Add a Category Under screen displays:



4. Type a name for the directory in the Folder name field (Do not use spaces or odd characters—!@#$%^&*(). Underscores are acceptable.)
5. Enter a title for the document in the Title field.
   - This Title is what will display in the InfoPortal view and in the Website-like “user” view. The Title does not have to match the filename; rather, it can be much more descriptive and as long as necessary.
6. Click on the Submit button.
   - The Category Folder is created and the folder name displays as a link to the folder contents.

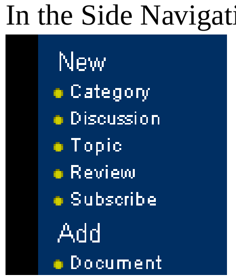
Creating a New Discussion Topic

Note

Only Site Administrators can create new Discussion Groups. Content Publishers may participate in groups and add new topics to groups.

This procedure posts a topic to a Discussion Group.

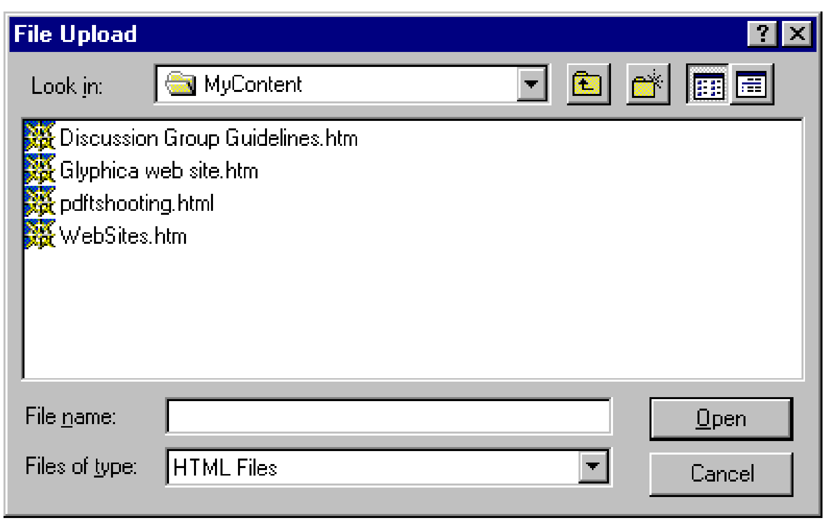
1. Navigate to the Discussion folder.
2. In the Side Navigation Bar, click on the File menu triangle to expand it.



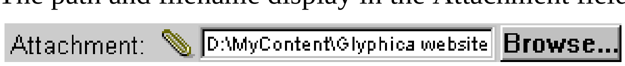
3. Click on the New Topic link.

- The New Topic screen displays:

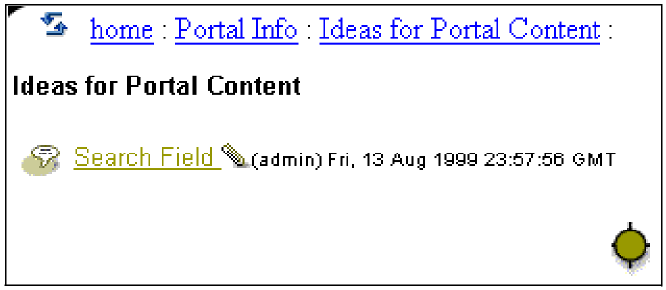
4. Enter a title in the Subject field.
5. (Optional) Click on the Browse button if you want to include an attachment with your message. Only one file can be attached to a message.
   - The File Upload window displays:



6. Locate the file and select it.
7. Click on the Open button.
   - The path and filename display in the Attachment field of the New Topic screen:



8. Enter your message in the text area below the buttons.
9. Click on the Post Msg button.
    - The message displays as a link in the Discussion folder:



Start Review of a Document

The document review process is a powerful workflow tool. In general, the function allows a Content Publisher to select a document, list in order the other Content Publishers (or entire Groups of Content Publishers) who should review the document, and then initiate a review process.

Each Content Publisher will receive a MyPortal notification in their Document Review window when it is their turn to review the document. They can add comments to the document.

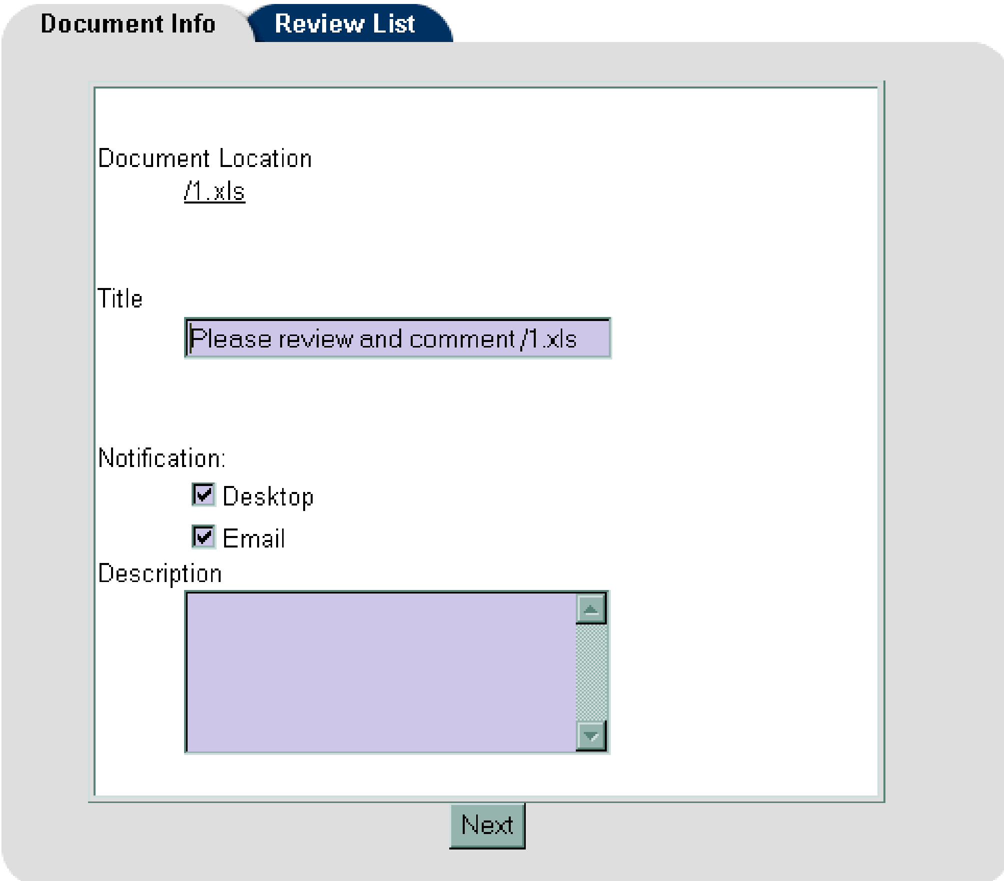
When the review process is finished, the Content Publisher who initiated the Review will be notified. The Initiator can also see the status of the review process, and from the Review Process window even send emails to reviewers to remind them or ask questions, etc.

1. In the Content Area, navigate to the directory where the document is located.
2. Click on the document icon to select it.
    - A check mark displays on the icon:

3. In the Side Navigation Bar, click on the Start Review menu.

4. Check on Review under the new heading.

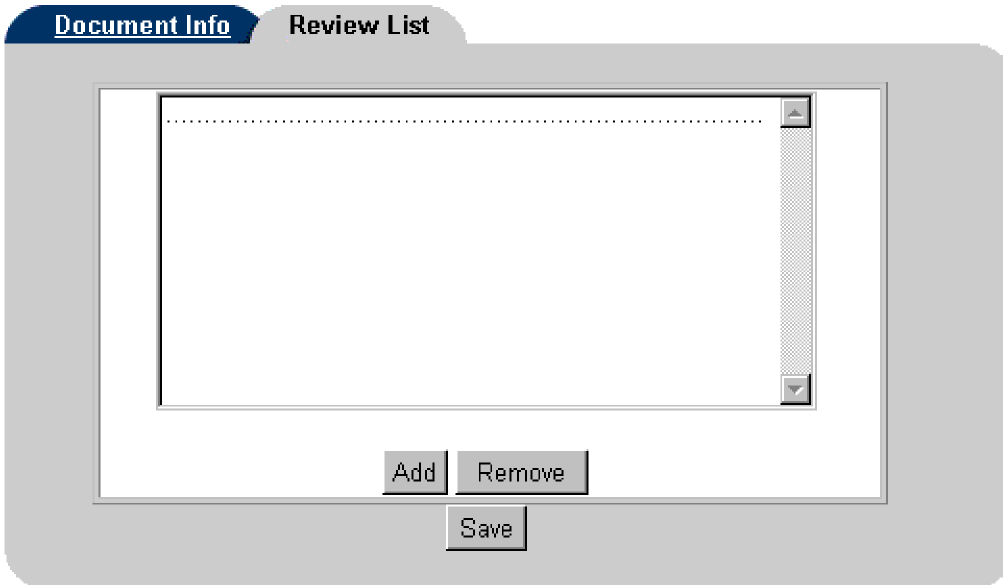
- The Document Info/Review List screen displays:



- The Title field displays the text that reviewers will see in their My Portal view.

5. If you wish to do so, enter a different title.
6. Click in the check boxes to check or uncheck the Reminder options you want to receive when the review process is finished.
    - **Desktop** puts a message in the Desktop Reminders window of your My Portal view when the review process is finished.
    - **Email** sends you an email message when the review process is finished. This method allows notification when you do not have access to the Portal, but do have access to email.
7. Click on the Next button.

- The Review List tab displays:



8. Click on the Add button.
   - The Search Users screen displays:

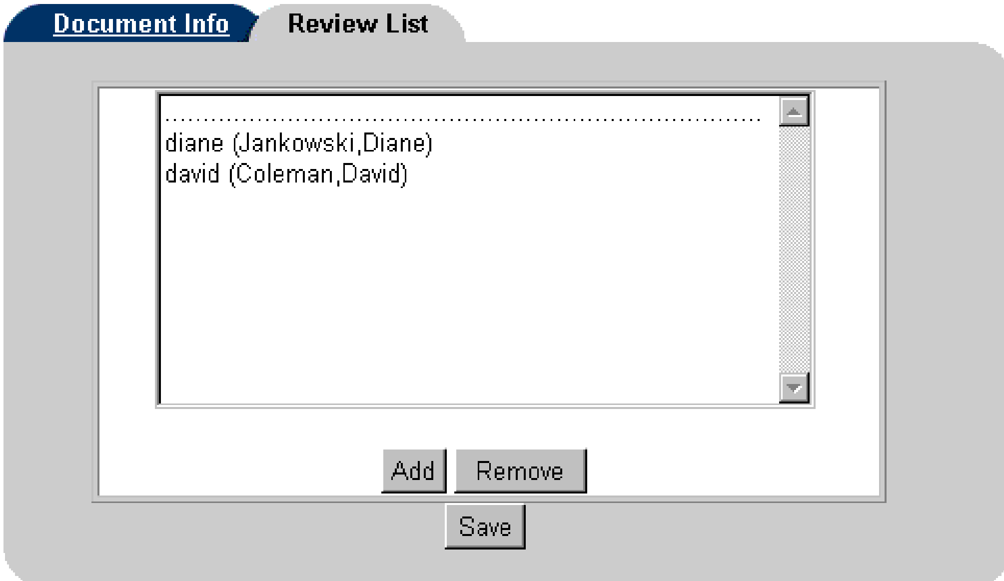
9. Enter search criteria (login ID, first and last name, ect) Click on the Submit button.
   - The list displays all users in the system that meet your search criteria.

	Login ID	Firstname	Lastname
Add	diane	Diane	Jankowski
Add	john	j	j
Add	bob	d	d
Add	david	David	Coleman
Add	julie	Julie	Callahan
Add	virginia	virginia	dickson
Add	admin	admin	

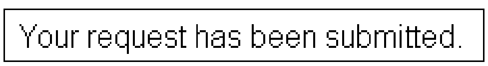
10. Click on the Add link for the user(s) you wish to add to the Review List.
    - Note that selection order is important. The review notice is sent in the same order in which you select reviews from the Search Users list. The first user chosen gets

the document first, and no one else gets notified until that person is done reviewing it.

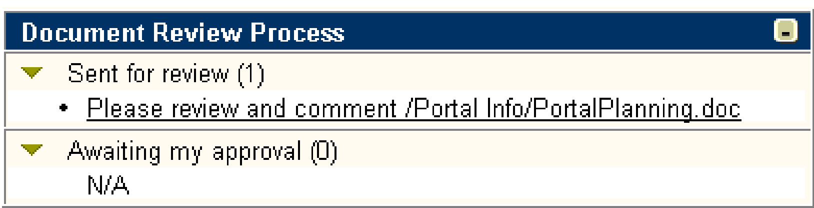
- After your selections, the User ID and names display in the Review List:



11. Click on the Save button.
    - A confirmation message displays.



- The system updates the Document Review Process window in your My Portal view:



Adding a Document

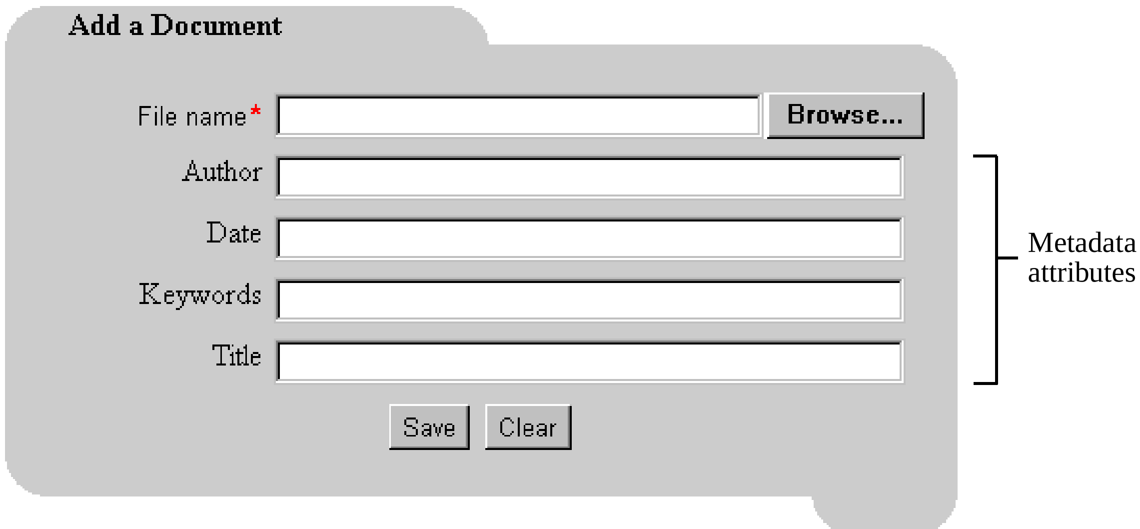
This procedure uploads a document to the selected Category Folder.

Content Publishers may add documents to existing Category folders at any time, if they have the proper security rights (set by the Administrator or other Content Publishers). The process described below may be considered “uploading” a document to the system. The moment the document is added to the InfoPortal, the document and its associated metadata are immediately indexed, and become available for search within moments of the completion of the Add Document process.

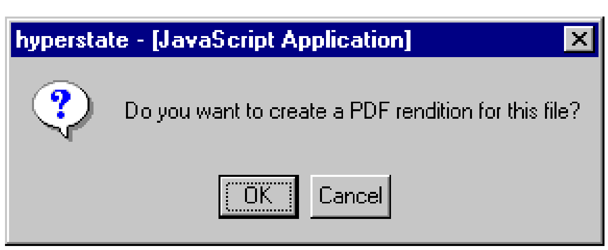
In addition, this process allows the Content Publisher to make Adobe Acrobat (PDF) “renditions” or copies of many document formats. The reason for this is that if a document is loaded in a proprietary format (PageMaker, for example), not all users will have the application necessary for viewing the document. However, PDF format is universally accepted and can be read by most computers. The PDF Rendition allows any user, anywhere, to view the document no matter what its original format.

1. Navigate into the Category Folder where you would like to place the document.

2. Click on the File menu.
3. Click on the Add Document link.
    - The Add a Document screen displays:



4. Click on the Browse button to the right of the File name field.
5. Select a file to upload.
    - The selected file name displays in the File name field.
    - Required fields are marked with an asterisk (*). The other fields are optional metadata fields. Data put in these fields become searchable items.
6. Fill in the Author and Date fields, as well as any other relevant fields that display.
    - The Date field will accept most standard date formats, such as 11/29/99; August 7, 1999; 7 September, 2000. The dates will be converted to numerals so that January 9, 1999 will apear as 1999/01/09 00:00:00.
7. Type one or more words in the Keywords field.
    - Keywords may or may not be necessary or useful, depending on your local implementation of InfoPortal. Keywords are not case-sensitive. You can use any character to separate the keywords and type as many keywords as needed, since there is no size limit on this field.
8. Enter a Title for the document in the Title field.
    - This Title is what will display in the InfoPortal view and in the Website-like “user” view. The Title does not have to match the filename; rather, it can be much more descriptive and as long as necessary.
9. Click on the Save button.
    - If the document is in a format that InfoPortal can convert to PDF, the following message displays:



    - Formats that may be converted to PDF:

Note:

PDF renditioning is only available in systems equipped with an optional Glyphica Satillite server. Therefore, you may nit see PDF rendition messages.

customized metadata sets, so what you see here may be different than what you see in your InfoPortal.

- HTML
- Microsoft Word
- Microsoft Powerpoint
- Microsoft Excel
- Adobe FrameMaker
- Adobe PageMaker
- Text

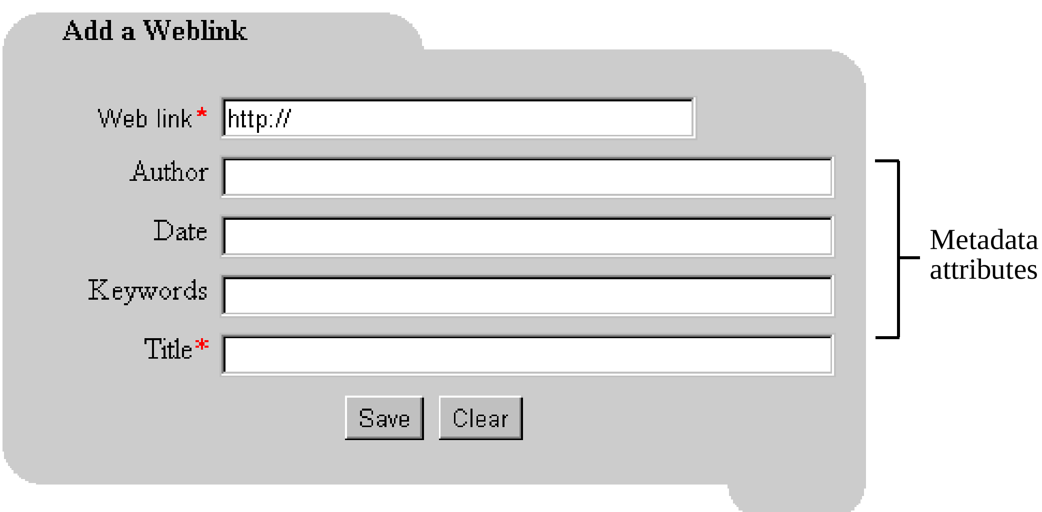
10. Click on the OK button.
    - The document is created and the file name displays as a link to the document contents. The Rendition icon will spin until the conversion process is complete *and* the view is refreshed.

Name	Title	Locked by
faq_doc.html	Frequently Asked Questions	

Adding a Web Link

This procedure creates a link to a remote web site on the Internet. It displays as a chain-link icon with a descriptive title.

1. Navigate into the Category Folder where you would like to create the Web Link.
2. Click on the File menu.
3. Click on the Add Weblink link.
    - The Add a Weblink screen displays:



4. Type the URL of the web site in the Web Link field.
    - You can also copy the URL from the location field of your browser. Note that InfoPortal already provides http:// as part of the Web Link field text, so you should not copy that text.
    - Required fields are marked with an asterisk (*). The other fields are optional metadata fields. Data put in these fields become searchable items.
5. Fill in the Author and Date fields, as well as any other relevant fields that display.

Note

The metadata fields shown in this Add a Weblink screen are the defaults that ship with InfoPortal 3.0. However, any implementation of the product will include customized metadata sets, so what you see here may be different than what you see in your InfoPortal. While Weblinks themselves are not searchable within InfoPortal, metadata associated with Weblinks **are** searchable.

- The Date field will accept most standard date formats, such as 11/29/99; August 7, 1999; 7 September, 2000.The dates will be converted to numerals so that January 9, 1999 will apear as 1999/01/09 00:00:00.

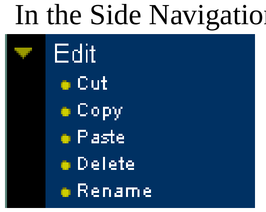
6. Type one or more words in the Keywords field, if desired.
7. Type an alternate name for the Web Link in the Title field. This is a required field.
8. Click on the Save button.
   - The Web Link is created and the URL displays as a link to the selected website.

Cutting a Document or Folder

This procedure moves a selected folder or document into memory. The folder or document is removed from the current directory once the paste operation is performed.

1. In the Content Area, click on the folder or document icon to select it.
   - A check mark displays on the icon.

2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.



3. Click on the Cut link.
4. Continue with “Pasting a Document or Folder,” page 3.27.

Copying a Document or Folder

This procedure places a copy of the folder or document in memory for pasting elsewhere in the Portal. The folder or document also remains in the current directory.

1. In the Content Area, click on the folder or document icon to select it.
   - A check mark displays on the icon.

2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.
3. Click on the Copy link.
4. Continue with “Pasting a Document or Folder,” page 3.27.

Pasting a Document or Folder

This procedure places the document, or a copy of the document, in the current directory after cutting or copying, respectively. When a document is copied or moved from one directory within InfoPortal to another, all associated metadata is copied with the document.

1. In the Content Area, navigate to the place where you want to move or copy the document or folder.
2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.
3. Click on the Paste link.
4. Click on the Refresh button 

to deselect the document icon in the Content Area.

> **Note**
> It is not possible to delete a document that is locked by another Content Publisher. Also, it is not possible to delete a Category folder if a document inside the folder is locked by another Content Publisher.

> **Note**
> You cannot paste more than once after a document has been cut.

Deleting a Document or Folder

This procedure removes the folder or document from the InfoPortal.

1. In the Content Area, click on the folder or document icon to select it.
   - A check mark displays on the icon.

Name	Title	Locked by
AboutPortals.doc	About Info Portals	
PortalPlanning.doc	Planning Portal Content	

2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.
3. Click on the Delete link.
   - A confirmation message displays:

4. Click on the OK button.
   - The document or folder is removed from the Portal.

Name	Title	Locked by
PortalPlanning.doc	Planning Portal Content	

Renaming a Document or Folder

This procedure changes the file name of an existing document or folder.

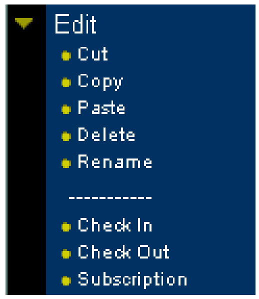
(To change the metadata title, see “Adding, Changing, and Deleting Document or Folder Attributes,” page 3.39.)

1. In the Content Area, click on the folder or document icon to select it.

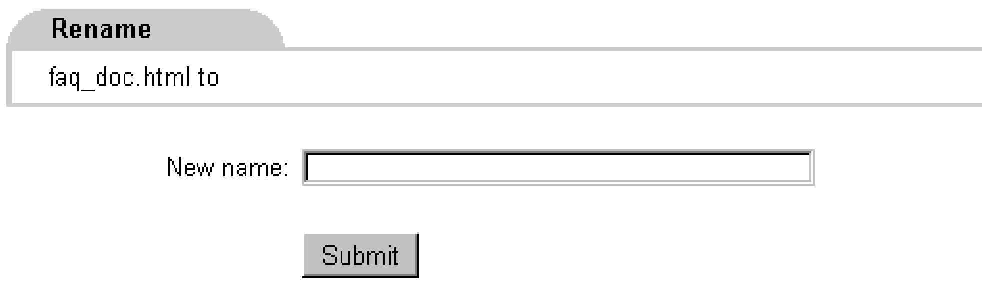
- A check mark displays on the icon.

Name	Title	Locked by
faq_doc.html	Frequently Asked Questions	

2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.



3. Click on the Rename link.
   - The Rename screen displays:



Note

Changing the extension of a document is not recommended, as it could result in the corruption of the document itself or difficulties in viewing the document..

4. Type the new document or folder name, including the extension, in the New Name field.
5. Click on the Submit button.
   - The new file name displays in the Content Area.

Name	Title	Locked by
faqs.html	Frequently Asked Questions	

Checking Out a Document

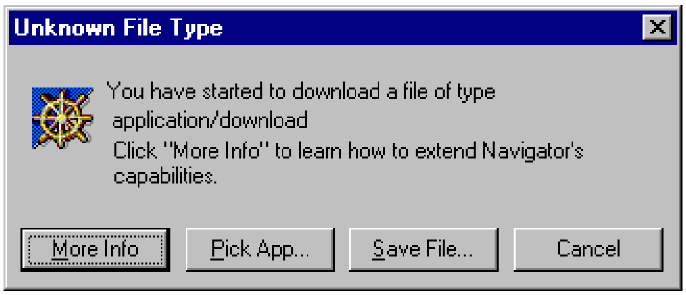
Checking Out a document is the first step in a set of procedures that are important to the version history and control of a document. Checking out a document places a copy of the document on your hard drive or network drive, and at the same time “locks” the file in the InfoPortal. Other Users and Content Publishers can still *read* the document, but cannot delete it or modify it. Only the Content Publisher who has locked the document (or the System Administrator) can unlock a document (either by manually unlocking it—see “Manually Locking/Unlocking a Document or Folder,” page 3.41—or by Checking In the document again—see “Checking In a Document,” page 3.29).

1. Click on the document icon to select it.

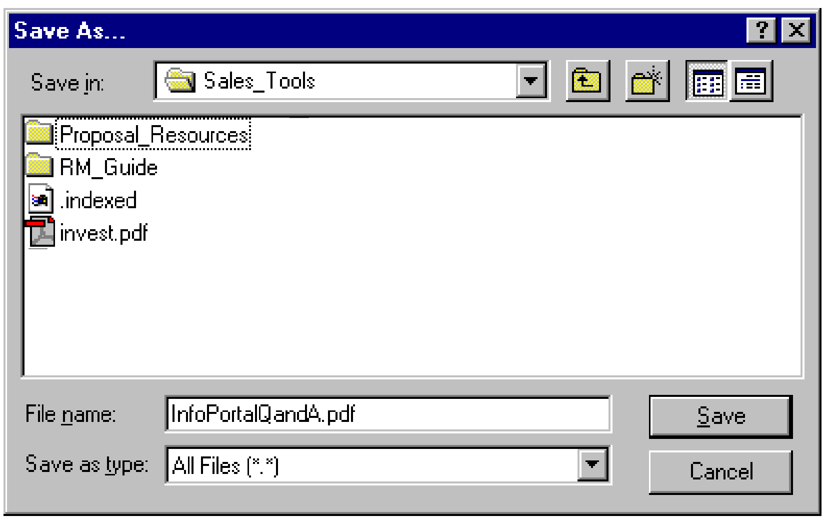
- A check mark displays on the icon.

Name	Title	Locked by
InfoPortalQandA.pdf	InfoPortal 3.0 Q&A	

2. Click on the Edit menu triangle to expand it.
3. Click on the Check Out link.
   - The application/download screen displays:



4. Click on the Save File button.
   - The Save As screen displays:



5. Navigate to where you want to save the file.
6. Click on the Save button.
   - Once the document is checked out, a blue padlock icon displays next to the file-name in the InfoPortal (in Report view only):

Name	Title	Locked by
InfoPortalQandA.pdf	InfoPortal 3.0 Q&A	jack

   - The user ID of the person who checked out the document displays in the Locked By field. The document will remain locked until it is checked in again.

Checking In a Document

Once a document has been checked out, you can work on the document in its native application (MS Word, PageMaker, etc.), then place a new version of the document back in the InfoPortal using the Check In function. Once a new version of the document has been Checked In, only the newest version will be visible to general Users and other Content Publishers.

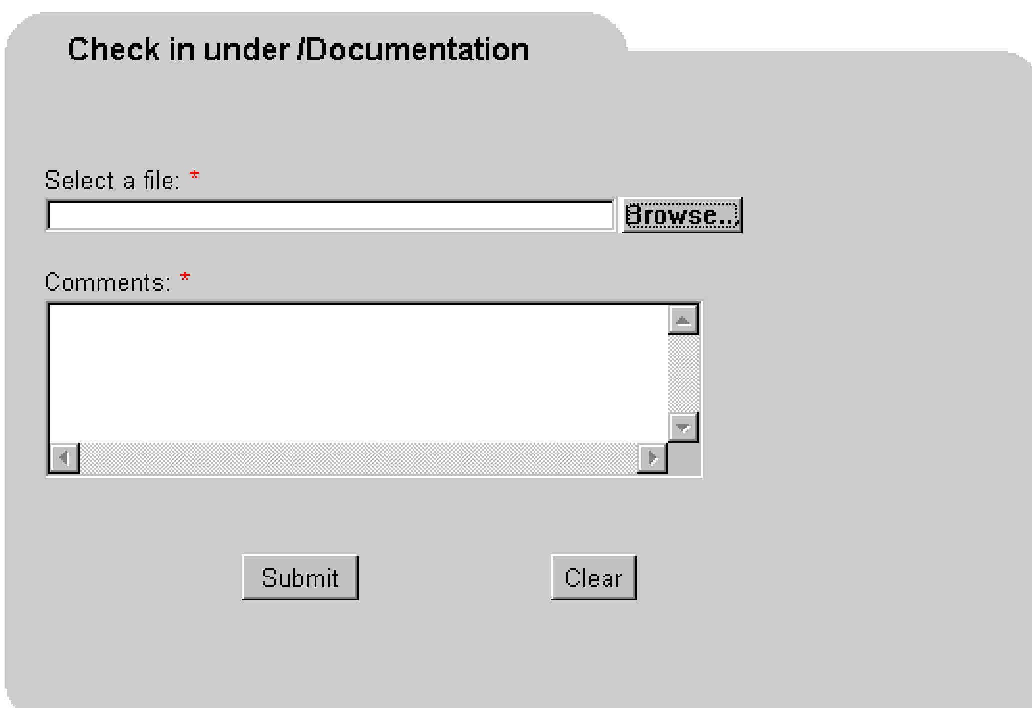
The only way to see the older versions of a document is to specifically look up the Version History of the document (see “Viewing Document Version History,” page 3.60).

There are two ways to do Check In:

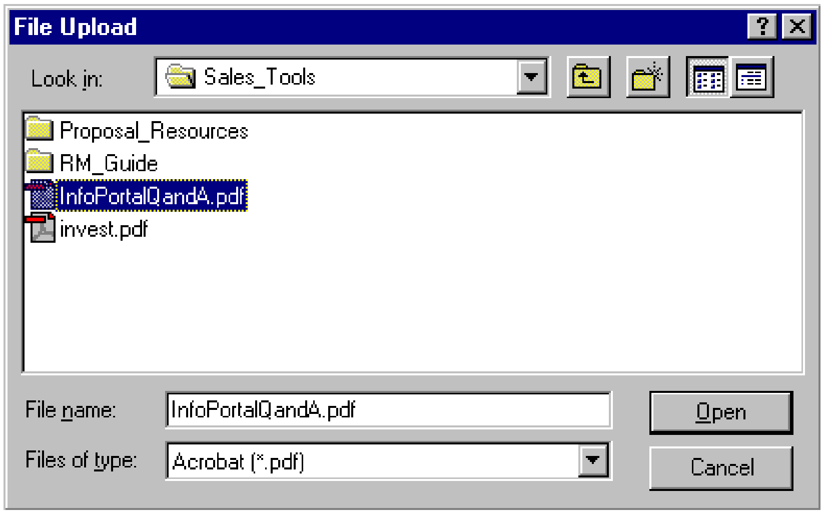
- Add a document to a folder (see “Adding a Document,” page 3.23) in which the document (same filename) already exists. If the folder is under version control, this action will work as a check-in.
- Check in the document using the procedure described here; note that the filename does **not** have to the same, as you have specified which document to check in.

1. Select the document to be checked in by clicking on its *icon* in the Content Area.
   - This selection becomes the **target** of the check-in. This way, if the document you are checking in has a different name, InfoPortal will still check it in as a new version of the selected document.
2. Click on the Edit menu triangle to expand it.

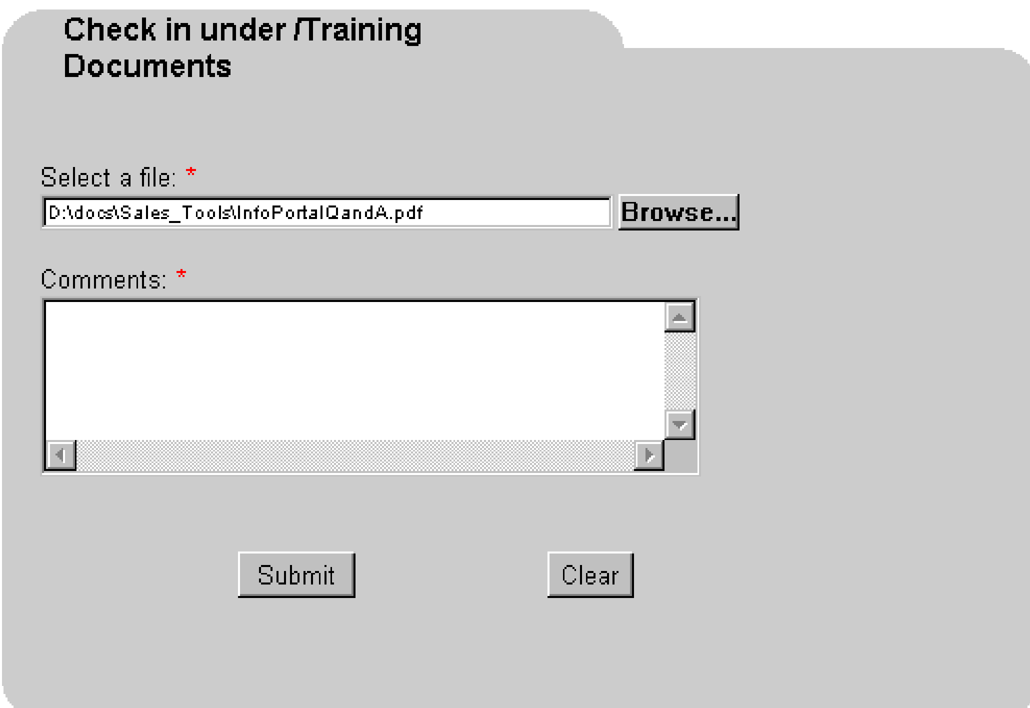
3. Click on the Check In link.
   - The Check In screen displays:



4. Click on the Browse button.
   - The File Upload window displays:



5. Select the file format from the Files of Type drop-down list.
6. Select the file to upload.
7. Click on the Open button.
   - The file name displays in the Select a File field:



8. Type a summary of the changes made (or other information) in the Comments field.
9. Click on the Submit button.
   - The new version of the document is checked in. (You can verify this by checking the document's version history; see "Viewing Document Version History," page

Note:

The comments field is mandatory. If no comments are included, you will receive a warning message and will not be permitted to complete the process without them.

3.60 for details). The file, which was locked while a version was checked out, is unlocked automatically after check-in.

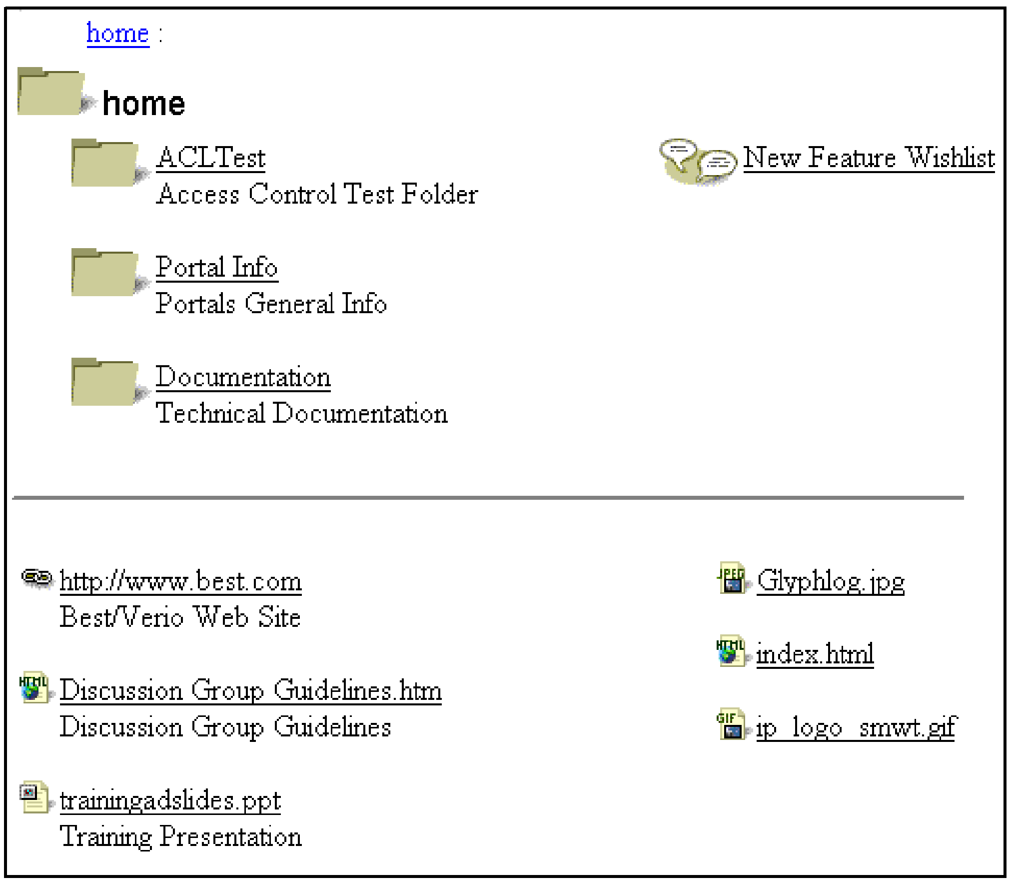
Name	Title	Locked by
InfoPortalQandA.pdf	InfoPortal 3.0 Q&A	

List View

This procedure displays the Content Area file structure in a double column.

1. In the Side Navigation Bar, click on the View menu triangle to expand it.

2. Click on the List link.
   - The List view displays.



Changing the Document Report View

This procedure displays the Content Area file structure in a single column, with the individual documents displayed in a table that also shows title and locked-by status. This is the default view.

1. In the Side Navigation Bar, click on the View menu triangle to expand it.

2. Click on the Report link.
   - The Report view displays:

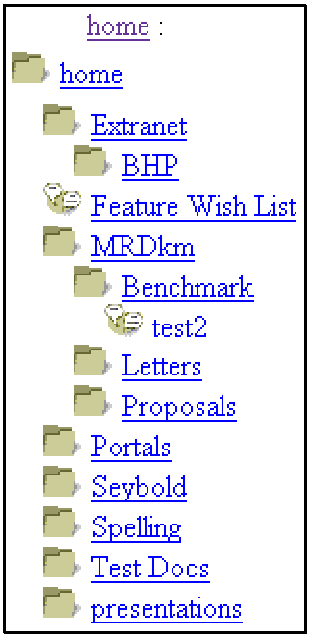
Viewing the Site Map

This procedure displays the Content Area directory structure in a hierarchical view, much like Windows Explorer. Each underlined title is a link to that directory's contents.

1. In the Side Navigation Bar, click on the View menu triangle to expand it.
2. Click on the Site link

Viewing the Site Map

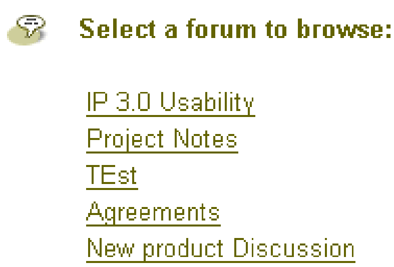
- The Site view displays:



Viewing Discussion Groups

This procedure displays the list of discussion groups within InfoPortal each underlined title is a link to the discussion's contents.

1. In the Side Navigation Bar, click on the View menu triangle to expand it.
2. Click on the Discussion link
   - The Discussion list displays:.

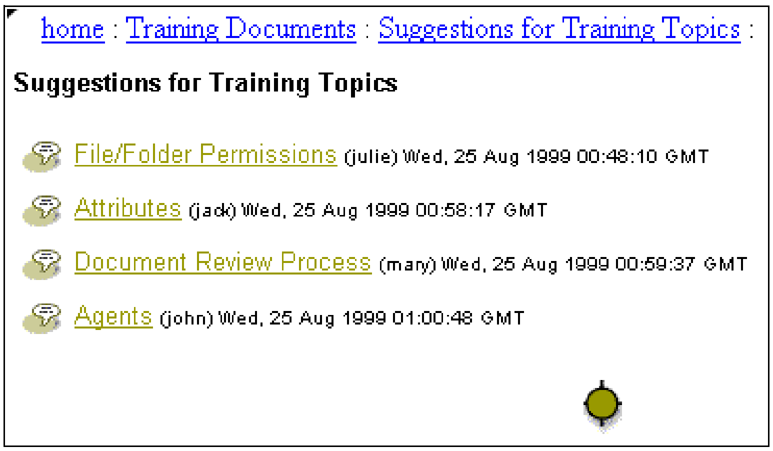


The Discussion Window

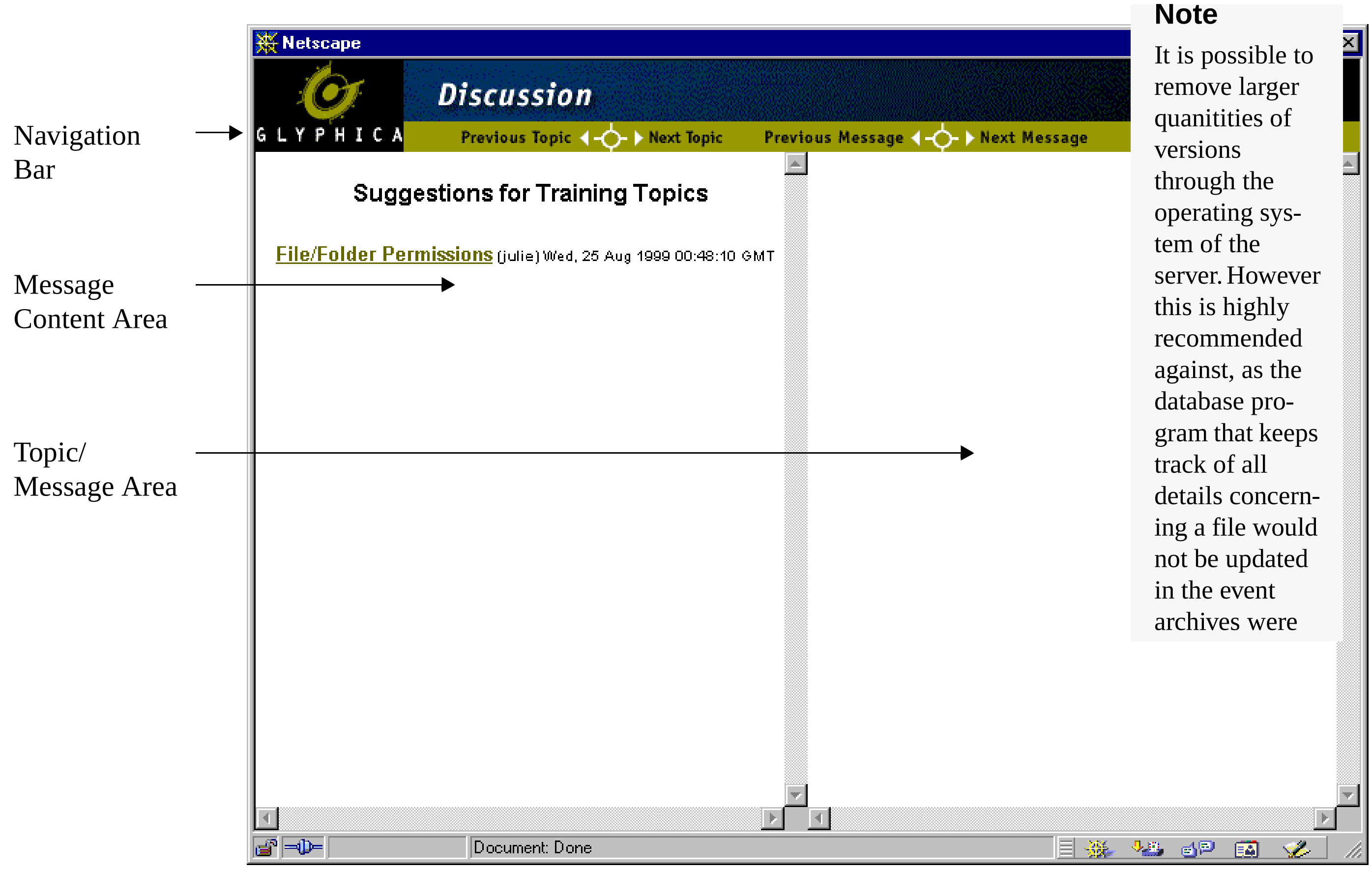
Content Publishers use the Discussion window to post messages and read the content of messages posted by other Content Publishers. These messages become discussion "threads." Discussions can only be added by Site or Account Administrators, though Content Publishers can add topics and have full access to existing discussions. To locate a discussion within the Portal collection, click on the Discussions link under the Edit menu. This will display a list of discussions. Or, locate a discussion within a category folder.

Content Publishers access the Discussion group by first clicking on a Discussion Group link:

This displays the Discussion Group topics:



When Content Publishers click on a topic link, the Discussion window displays in a separate browser window:



Note

It is possible to remove larger quanitities of versions through the operating system of the server. However this is highly recommended against, as the database program that keeps track of all details concerning a file would not be updated in the event archives were

The Discussion window contains three areas:

- Navigation Bar
- Topic/Message Area
- Message Content Area

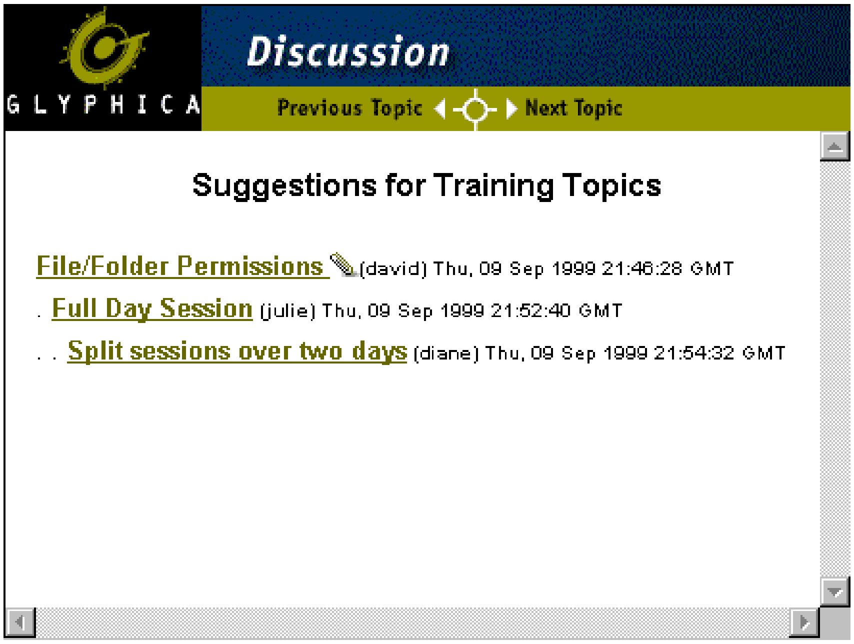
Navigation Bar

The Navigation Bar contains buttons that make it easier and faster for Content Publishers to navigate in a Discussion Group folder. In addition, Content Publishers can post response messages to an existing topic "thread."

Button	Function
Previous Topic	Moves to the previous topic within the Discussion Group.
Next Topic	Moves to the next topic within the Discussion Group.
Previous Message	Moves to the previous message within the topic.
Next Message	Moves to the next message within the topic.
Respond	Displays the New Response window, which allows Content Publishers to create a subject/message to add to an existing topic thread. Once a message is posted, its contents cannot be changed, and only the Site Administrator can remove it.
Delete	Removes a topic or response message. Only the Site Administrator can remove topics and messages.

TOPIC/MESSAGE AREA

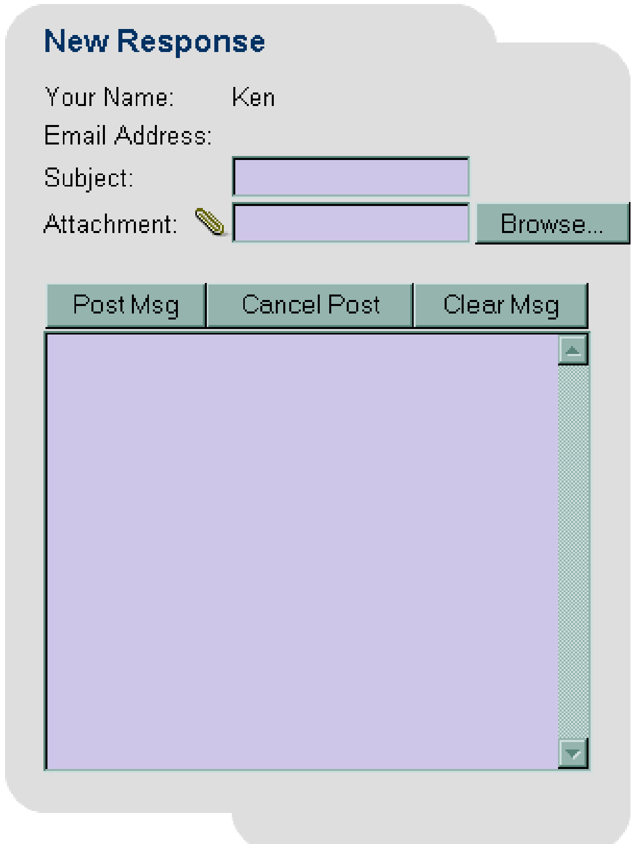
The Topic/Message area displays on the left-hand side of the split window. It contains the title of the Discussion Group, the topic, and a list of message links relating to that topic. Attachments to messages display as a paper clip icon to the right of the message link.



Each message link displays the title of the message, the User ID of the person who posted the message, and the date and time the message was posted. Clicking on a link displays the content of the message in the Message Content area.

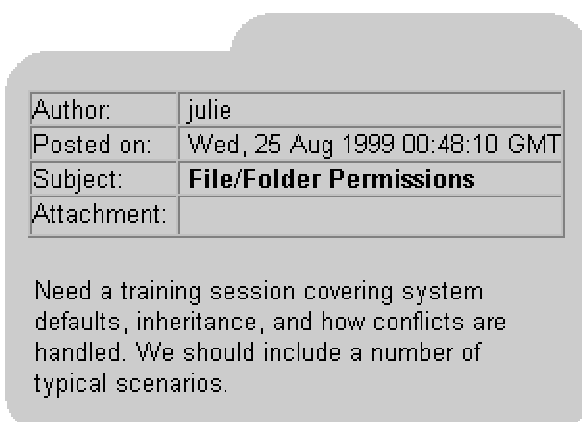
The first link in the list is the topic link. This link displays the main message content from which the discussion threads develop. The response messages are listed below the topic link in hierarchical order. Link titles preceded by one dot are on the first level, titles preceded by two dots are on the second level, and so on. For example, in the graphic above, “File/Folder Permissions” is the topic. The message “Full Day Session” is a response to the content in the first topic, “File/Folder Permissions.” The message “Split sessions over two days” is a response to the content in the second-level topic, “Full Day Session.”

When a Content Publisher clicks on the Respond button, the Topic/Message area displays the New Response screen:



Content Publishers use the New Response screen to respond to the message that displays in the Message Content area, the right-hand side of the split window.

Message Content Area

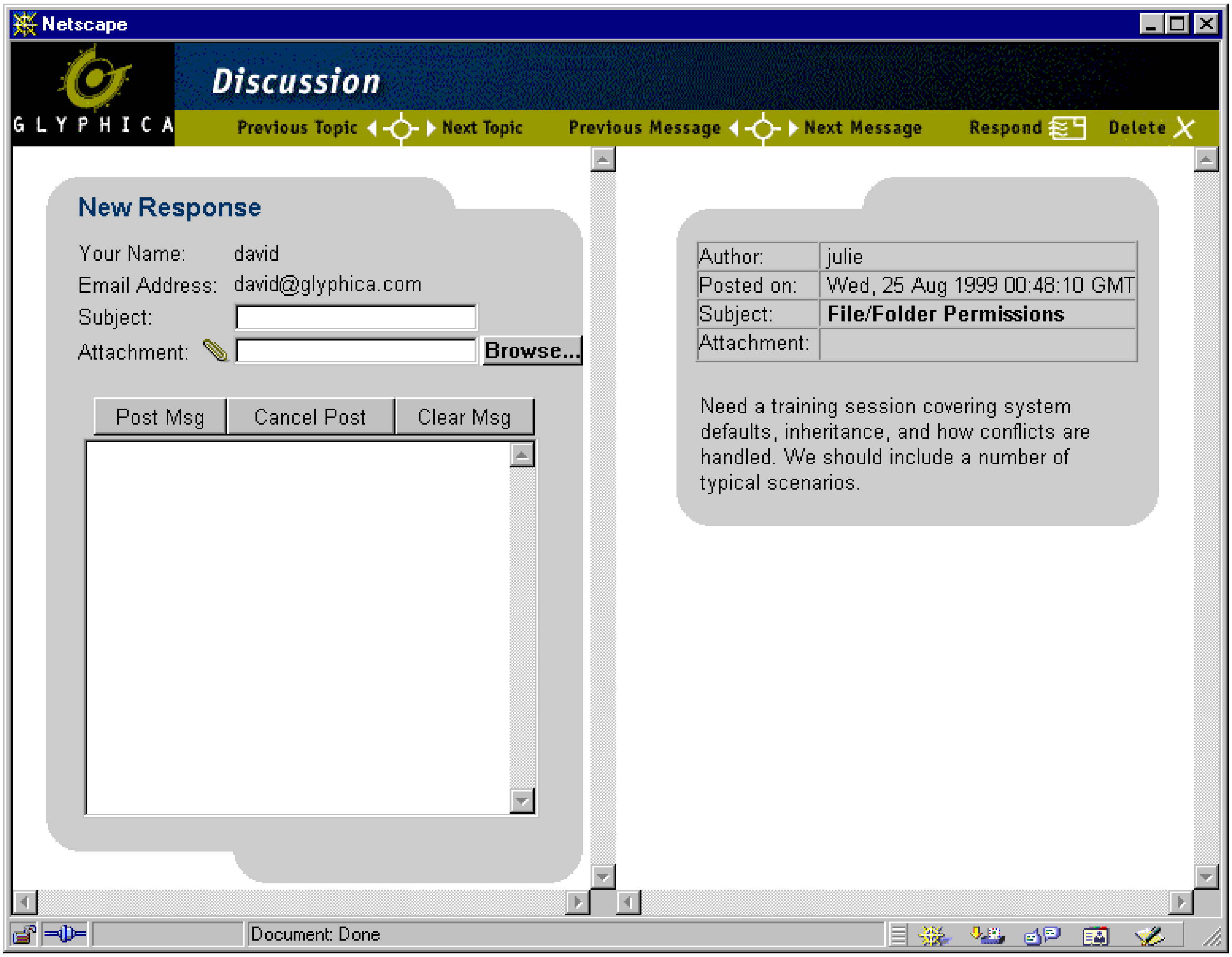


Note

Once posted, a message's content cannot be changed—not even by the message owner or the Site Administrator. The Site Administrator can delete a message, not change it.

The Message Content area displays on the right-hand side of the split window. When a Content Publisher clicks on a topic or message link in the Topic/Message area, the message displays in the Message Content area. The Message Content area displays the author of the message, the date the message was posted, the message subject, and the message text. This area is read-only. It cannot be changed. If a file is attached to the message, a link displays to access the file.

The Message Content area becomes a reference when creating a response to a message in the New Response screen .(see "Responding to a Topic," page 3.66):



Adding, Changing, and Deleting Document or Folder Attributes

Metadata attributes, as mentioned in the Content Publishing overview, are information about a document, folder or item—such as a weblink or discussion group—which may not be in the actual text of the document, but can be associated with it for the purposes of search or description. For example, when searching it may be more useful to look for a specific piece of information, such as Country, which may not be described in the document but could have been associated with it during the document addition process. As you work with this section of the manual, be aware that these document or folder attributes can be as important as the documents they describe.

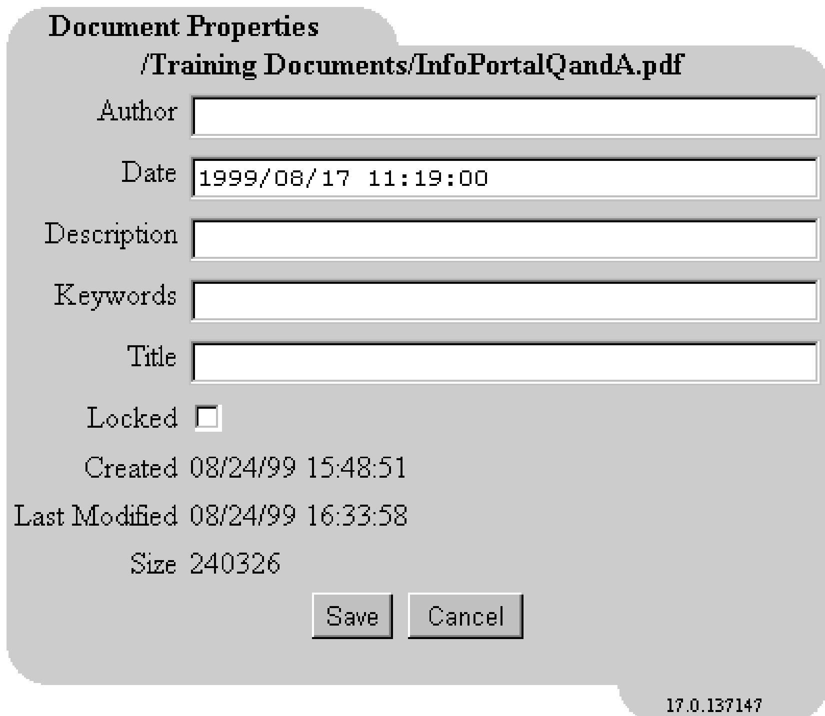
This procedure displays the metadata fields for a folder or document so you can add, modify, or delete the information in those fields.

1. In the Content Area, click on the folder or document icon to select it.

- A check mark displays on the icon.

2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the General link.
   - The Document Properties screen displays:



4. To add metadata, click in the appropriate attribute field and enter the information.
5. To modify metadata, highlight the information in the appropriate attribute field and enter the changes.
6. To delete metadata, highlight the information in the appropriate attribute field and press the Delete or Backspace key.
7. Click on the Save button.
   - The Cancel button will reset any entries and return you to the Category view.
8. Click on the Refresh button  to deselect the document icon in the Content Area.

Note

In order to make the changes to the meta-

Note:

Metadata is usually added duringthe Add Document process, but documents moved into the portal in the file system or Web Dav may not have metadta accaciated with it.

Manually Locking/Unlocking a Document or Folder

This procedure manually locks or unlocks a document or folder. Typically a document or folder is automatically locked and unlocked during check-out and check-in, respectively.

1. In the Content Area, click on the folder or document icon to select it.
   - A check mark displays on the icon.

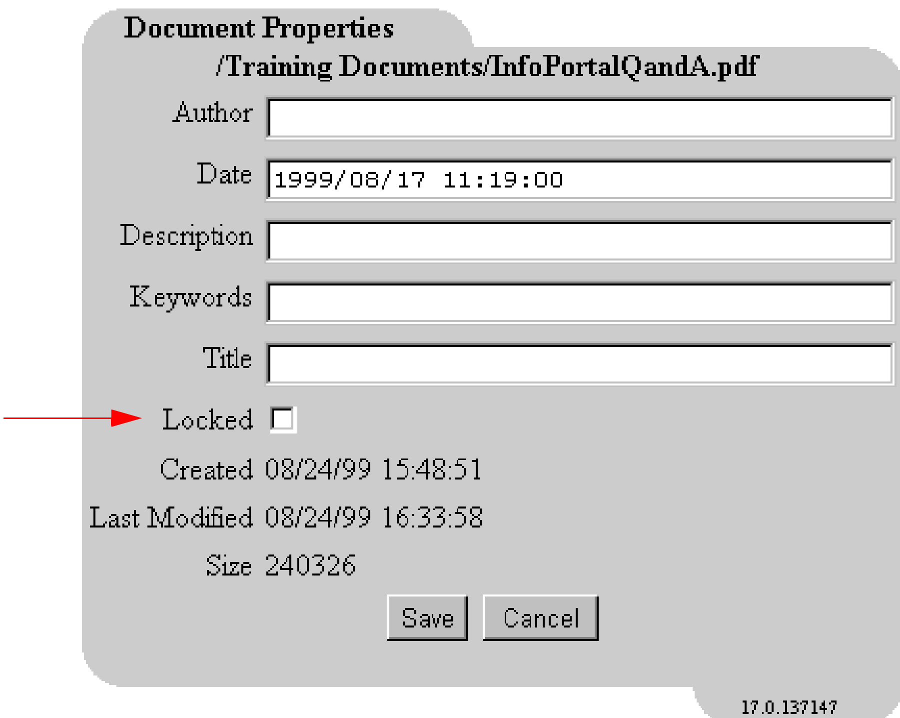
Name	Title	Loc
InfoPortalQandA.pdf	InfoPortal 3.0 Q&A	

Note:

This example show a very limited metedata set. Your view my contian more fields.

2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the General link.
   - The Document Properties screen displays:



4. To lock the document or folder, click in the Locked check box. The field will display a check mark.
5. To unlock the document or folder, click in the Locked check box.
6. Click on the Save button.
   - If you locked the item, the user ID of the person who locked the item displays to the right of the field. In addition, a padlock icon displays next to the filename:

Note

Only the document/ folder owner and the Site Administrator can unlock a locked document or folder.

Name	Title	Locked by
InfoPortalQandA.pdf	InfoPortal 3.0 Q&A	jack

- If you unlocked the item, the check mark will be removed from the field. The user ID next to the field also is removed, and the pad lock icon disappearing.

Name	Title	Locked by
InfoPortalQandA.pdf		

Security (files and folders) Overview

Security settings allow Content Publishers to grant or restrict access to information or categories by user or group. They also allow, through the use of the “hidden” function, the ability for documents to be prepared without exposure in an area of the site and then exposed to the correct users and groups by changing the status from “hidden” to “visible.” Access controls are a very powerful tool for controlling the distribution and visibility of information in the Portal, and it is important to fully understand how Access Controls work before setting them inside the Portal. Most importantly, it is necessary to review the functions of the controls and *the order in which the controls are executed by the system* to make sure that improper controls are not set. Be sure to review the sections on the following pages carefully in order to avoid granting access to users who should not have access—or locking out those who should. After setting access controll, it is usually a good idea to test the settings.

Permissions Targets

The following table lists the terms used in the Target field of the File Permissions and Directory Permissions screens, and how they relate to users in the system:

Target Name	Corresponding System Users
Authors	Content Publishers
Administrators	Site Administrators
Subadmins	Account Administrators
Allusers	Content Publishers, Site Administrators, and Account Administrators

Other users groups may exist as well; the above example shows only the default groups shipped with InfoPortal.

System Defaults

For all newly-created documents and folders:

- All permissions are denied.
- All are Hidden when created, meaning they are not visible to others.
- Members of Groups Authors, Administrators, and Subadmins are granted read/write/delete access.
- The creator of a document or folder is explictly given full access.
- Members of Group Allusers are granted read-only access.

You can select multiple users or groups to which to apply permissions. Granting Administrator privileges (which includes Site Administrator and Account Administrators) gives Full Access to the document, which cannot be denied except by another Administrator. Owner does not grant any special privileges, but rather has the same privileges as other Content Publishers. It is for informational purposes only, to denote who created the document or folder.

The following table lists the available permission options:

Permission Option*	Explanation
Deny Access (RWDS)	No access is allowed to the document or folder.
Full Access (rwds)	Allows the Target User or Group to view, change, and delete the document or folder and its associated metadata. This option also grants access to set permissions. Inheritance rules apply.
Read (r)	Allows the Target User or Group to view the document or folder. This option also grants access to view, but not change, the metadata. Inheritance rules apply.
Read Only (rWDS)	Allows the Target User or Group to view the document or folder and its associated metadata. This option explicitly denies changing, deleting, and setting permissions that could otherwise be inherited from higher levels.
Read/Write (rw)	Allows the Target User or Group to view and change the document or folder and its associated metadata. Inheritance rules apply.
Read/Write Only (rwDS)	Allows the Target User or Group to view and change the document or folder and its associated metadata. This option explicitly denies deleting and setting permissions that would otherwise be inherited from higher levels.
Read/Write/Delete (rwd)	Allows the Target User or Group to view, modify, and delete the document or folder and its associated metadata. This option does not allow setting permissions on the document or folder. Inheritance rules apply.
Deny Write/Delete/Set Permissions (WDS)	Explicitly denies changing and deleting the document or folder, and setting permissions on the document or folder that would otherwise be inherited from higher levels.
Deny Delete/Set Permissions (DS)	Explicitly denies deleting the document or folder, and setting permissions on the document or folder that would otherwise be inherited from higher levels.
Deny Set Permissions (S)	Explicitly denies setting permissions on the document or folder that would otherwise be inherited from higher levels.

* *In the Permission Option column of the preceding table, the lower-case letters in parentheses list elements that are permitted; the capital letters in parentheses list elements that are denied.*

Permissions are hierarchical; that is, folders and documents at lower levels inherit permissions from higher levels, unless you explicitly deny them. Use the “Only” permission options to do this; they stop the selected User or Group from inheriting permissions from a higher level. For example, if the Root directory folder grants read/write/delete permission for Content Publishers, to keep a lower-level directory folder from being deleted, set Read/Write Only permission for the group Content Publishers on that particular directory folder.

Assigning conflicting permissions to two different groups on the same folder could create ambiguity if a user belongs to both groups. In general, it is recommended that such a situation be avoided by assigning the conflicting permissions to different directory levels so that the evaluation order is explicit.

Failing that, if two groups have conflicting rights on the same document or folder, the **smaller** (subset) group’s permissions are handled first, then the larger group’s permissions. For example, if Deny Delete/Set Permissions is set for the Alluser group (all users in the system), and Full Access is set for the Documentation group (a subset of Allusers), then Users in the Documentation group could delete and set permissions, but all other users who are not in the Documentation group could not.

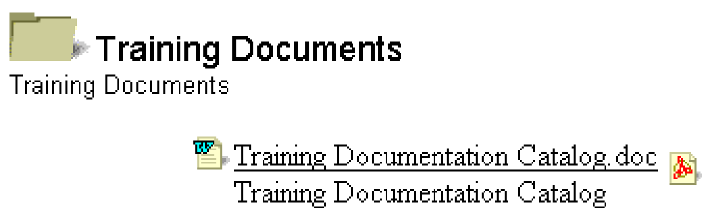
If two peer groups of the same size have conflicting permissions on the same document or folder, the results are ambiguous. You can avoid this ambiguity by keeping in mind another rule of permissions: you cannot allow or deny permission a level below, then do the opposite a level above (think of it as once denied, always denied).

The “direction” you use when setting up permissions is from bottom to top in the directory structure. Permissions start at the bottom, but can trickle down from the top; if a trickle-down permission conflicts with a permission at a lower level in the directory structure, the lower-level permission takes precedence.

RULES OF PERMISSIONS

- Permissions already granted cannot be denied.
- Permissions already denied cannot be granted.
- Evaluation order at peer level is individual, then subset groups in order from smallest to largest, then group.

For example, let us assume that Documentation and Training are separate groups of equal size. User X is a member of both groups. User X wants to be able to delete Training Documentation Catalog document in the Training Documents folder, but User X does not want anyone else in *Training* to be able to delete it.



Add the Training group with Deny Delete/Set Permissions set for the **folder** containing the document, which is the level above:

Settings:

Result:

Directory Permissions

Name:

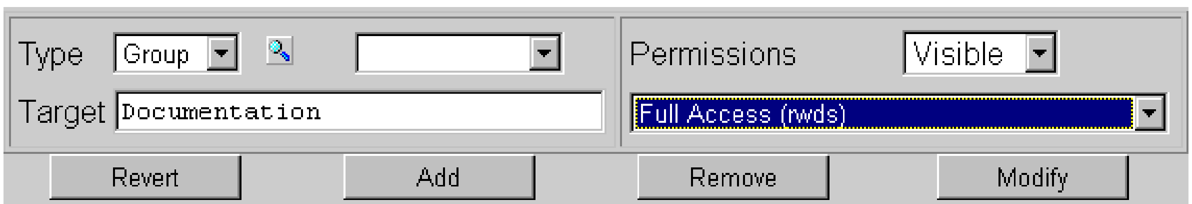
/Training Documents

Note: Directory access control settings are inherited by all subdirectories.

	Type	Target	Permission	Hidden	Admin	Owner
	Group	authors	Read/Write/Delete (rwd)	No	No	No
	Group	administrators	Read/Write/Delete (rwd)	No	No	No
	Group	subadmins	Read/Write/Delete (rwd)	No	No	No
	Group	allusers	Read (r)	No	No	No
	Group	Training	Deny Delete/Set Permissions (DS)	No	No	No

Then add the Documentation group with Full Access permission set for the **document** itself:

Settings:



Result:

File Permissions

Name:

/Training Documents/Training Documentation Catalog.doc

	Type	Target	Permission	Hidden	Admin	Owner
	Group	authors	Read/Write/Delete (rwd)	No	No	No
	Group	administrators	Read/Write/Delete (rwd)	No	No	No
	Group	subadmins	Read/Write/Delete (rwd)	No	No	No
	Group	allusers	Read (r)	No	No	No
	User	admin	Full Access (rwds)	No	Yes	No
	Group	NorthPoint	Deny Access (RWDS)	Yes	No	No
	Group	Training	Deny Delete/Set Permissions (DS)	No	No	No
	Group	Documentation	Full Access (rwds)	No	No	No

When a person from the Training Group other than User X tries to delete the document, they cannot do so and the following message displays:

If two peer groups of the same size do *not* have conflicting permissions on the same document or folder, the results are determined by the chronological order in which permissions were applied; first in, first applied.

Adding File Permissions

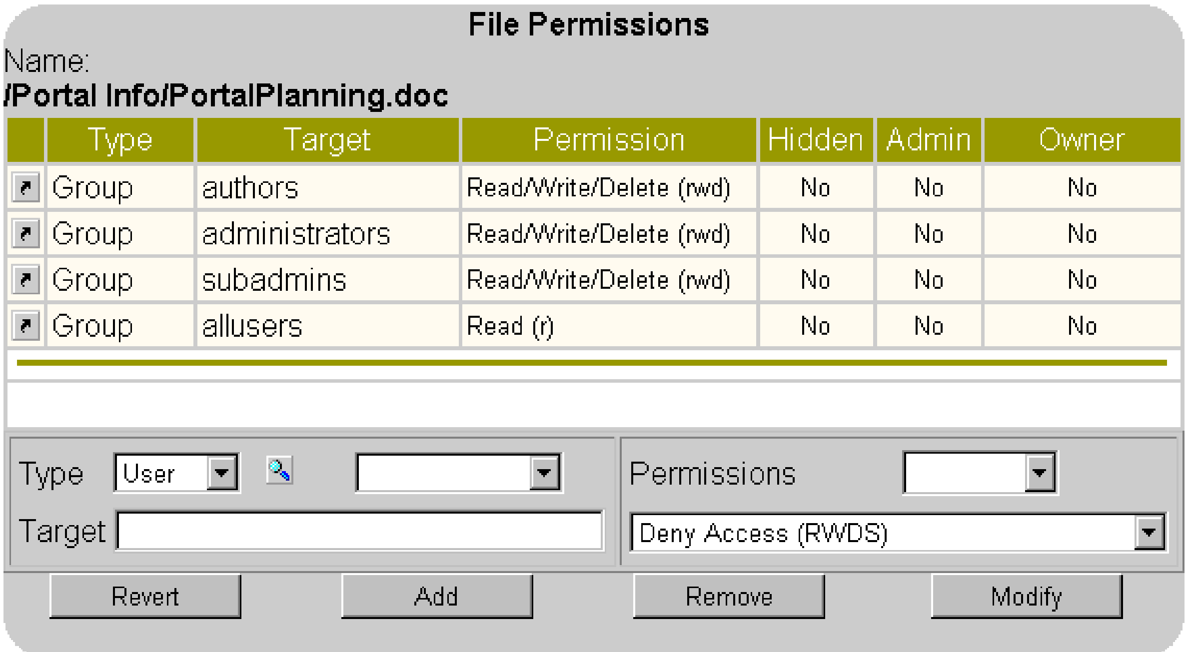
This procedure displays the File Permissions screen for the selected document so you can view the current permissions, and add others. For an overview of permissions, see “Security (files and folders) Overview,” page 3.42.

1. In the Content Area, click on the document icon to select it.
   - A check mark displays on the icon:

2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Security link.

- The File Permissions screen displays:

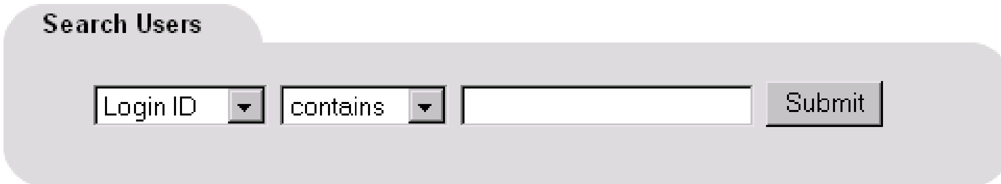


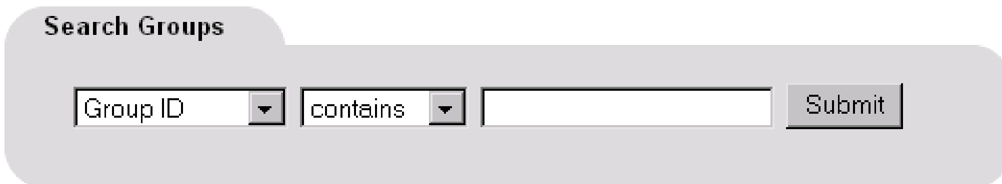
- The upper part of the screen displays the current file permissions. The icon to the left of the Type field denotes permissions that are inherited from a higher level. If you click on the icon, the permissions in the next higher level display (in the example above, clicking on shows you the permissions set for the Portal Info folder). See “Security (files and folders) Overview,” page 3.42 for details on permission inheritance.
- The lower part of the screen (in gray) is where Content Publishers can change or remove permissions.

4. In the lower part of the screen (in gray), select User or Group from the Type drop-down list.

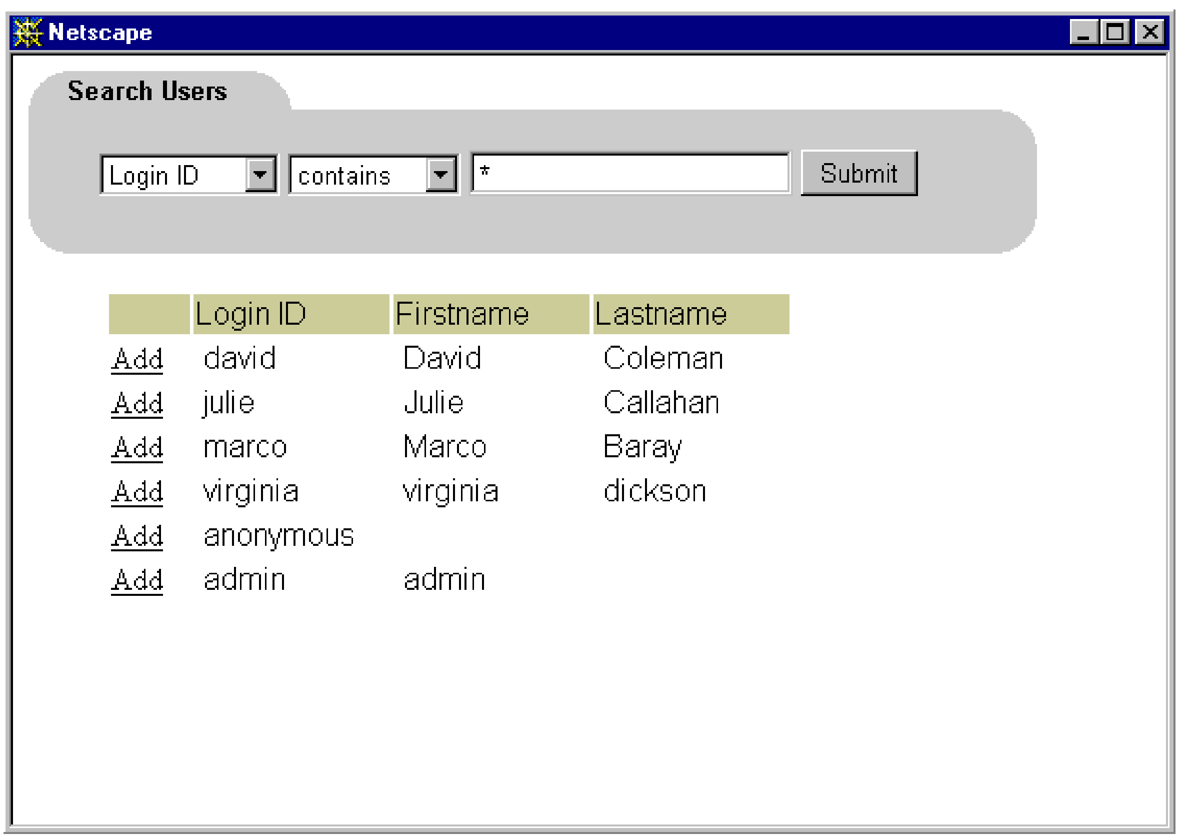
5. Click on the icon to the right of the Type field.

- Depending on whether you selected User or Group, the Search Users or Search Groups screen displays, respectively:





6. Enter your search criteria.
   - See “Finding a User,” page 4.17 for details on finding users.
7. Click on the Submit button.
   - The search results display:

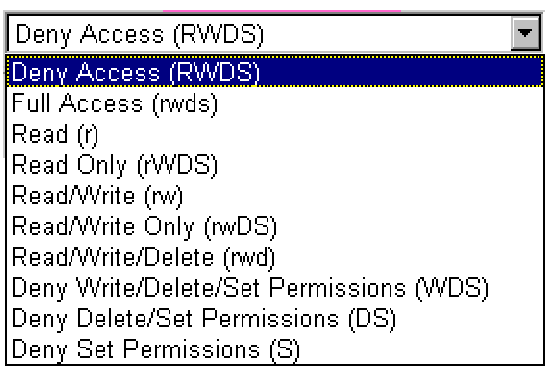


8. Click on the Add link to the left of the user(s) or group(s) you wish to select.
   - You can select multiple users or groups to which to apply permissions.
9. Click on the ☒ icon to close the Search window.

- The Target field displays the ID of the User(s) or Group(s).

- If security has been set for an individual, that user's Login ID will display in the Target field. If Group security permission has been set, the name of that group will show here. It is possible to have multiple users or groups or a combination of users and groups in each security entry.

10. Select Blank, Owner or Administrator from the drop-down list to the right of the  icon.
    - The Blank option allows inheritance from higher levels. Administrator grants Full Access to the document that cannot be denied except by another Administrator. Owner does not grant any special privileges, it has the same privileges as other Content Publishers; it is for informational purposes only.
11. In the Permissions area, select Blank, Hidden, or Visible from the upper drop-down list.
    - The Blank option allows inheritance from higher levels. The Hidden and Visible options set explicitlywhether to hide or show the document to the selected users or groups. Hiding a document can be used as a shortcut: rather than denying access, then going back and reseting permissions to allow access, you can set permissions once, then hide the document from those particular users or groups until you are ready to grant them access.
12. Select a permission option from the lower drop-down list.



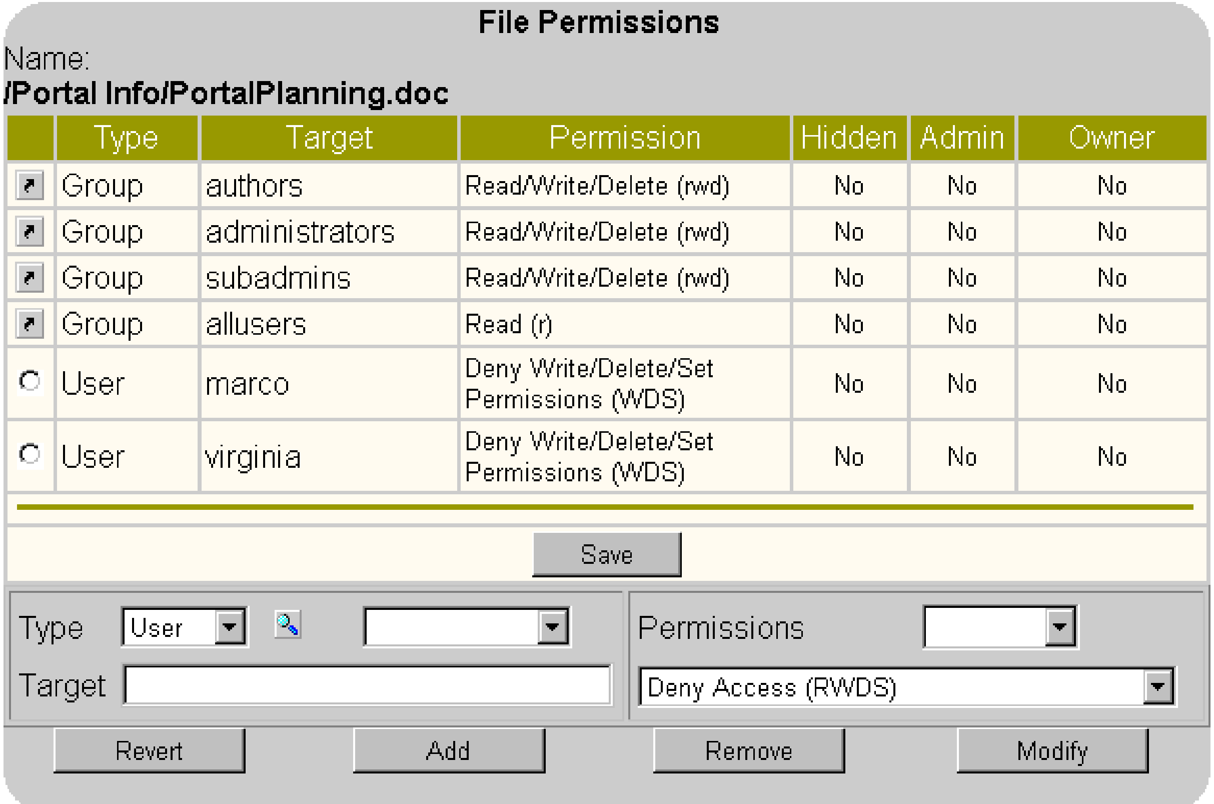
Note

Allowed permissions are lower case, denied are Upper Case in this list.

- See “Security (files and folders) Overview,” page 3.42 for explanations of the various permission options.

13. Click on the Add button.

- The users or groups and their permission settings display in the File Permissions window.



Note

You must **Save** for the new permissions to take effect.

14. Click on the Save button.
    - The change is saved and you return to the Category view.
15. Click on the Refresh button  to deselect the document icon in the Content Area.

Changing File Permissions

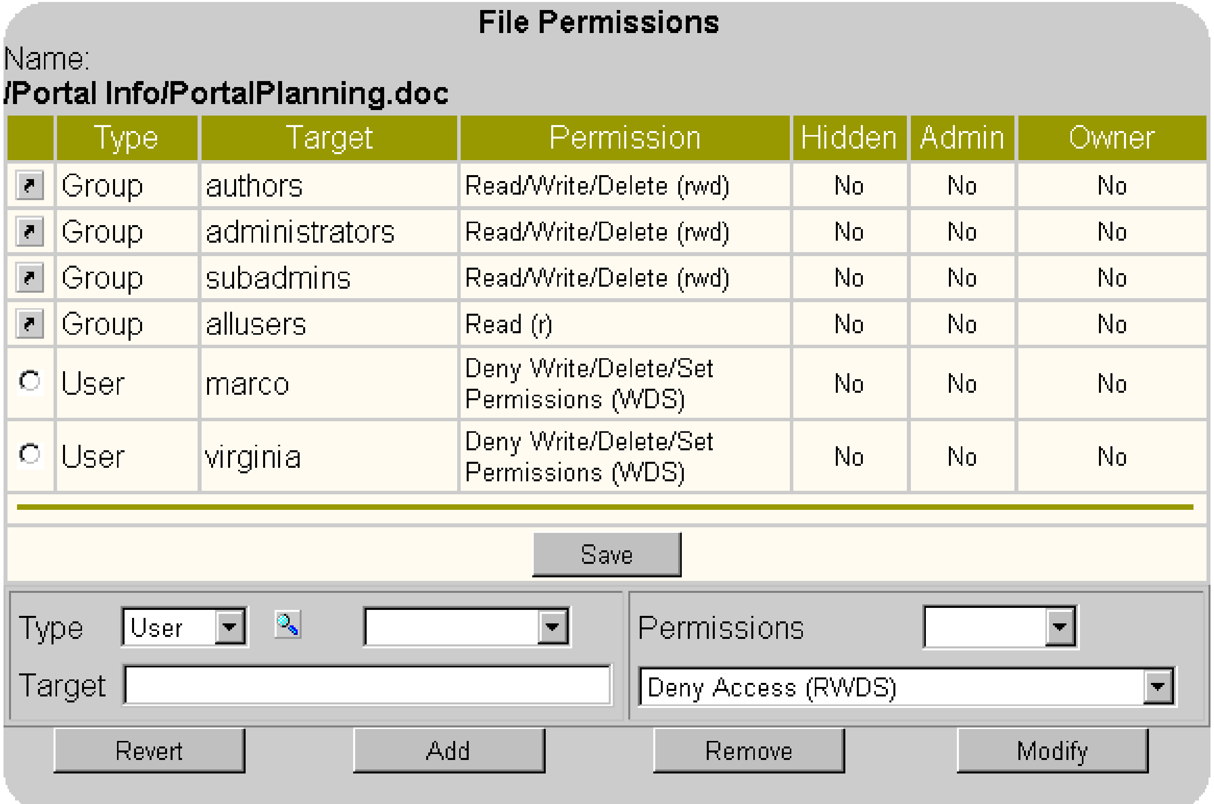
This procedure displays the File Permissions screen for the selected file so you can view the current permissions, select those you wish to change, and make the changes to them.

1. In the Content Area, click on the document icon to select it.
    - A check mark displays on the icon:

2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Security link.

- The File Permissions screen displays:



	Type	Target	Permission	Hidden	Admin	Owner
	Group	authors	Read/Write/Delete (rwd)	No	No	No
	Group	administrators	Read/Write/Delete (rwd)	No	No	No
	Group	subadmins	Read/Write/Delete (rwd)	No	No	No
	Group	allusers	Read (r)	No	No	No
	User	marco	Deny Write/Delete/Set Permissions (WDS)	No	No	No
	User	virginia	Deny Write/Delete/Set Permissions (WDS)	No	No	No

4. Click on the radio button for the user or group permissions you wish to change.
   - The settings display in the lower (gray) part of the File Permissions screen.
5. Enter the appropriate changes.
6. Click on the Modify button.
   - The changes display in the File Permissions screen.
7. Click on the Save button.
   - The change is saved and you return to the Category view.
8. Click on the Refresh button REFRESH to deselect the document icon in the Content Area.

Note

You must **Save** for the new permissions to take effect.

Removing File Permissions

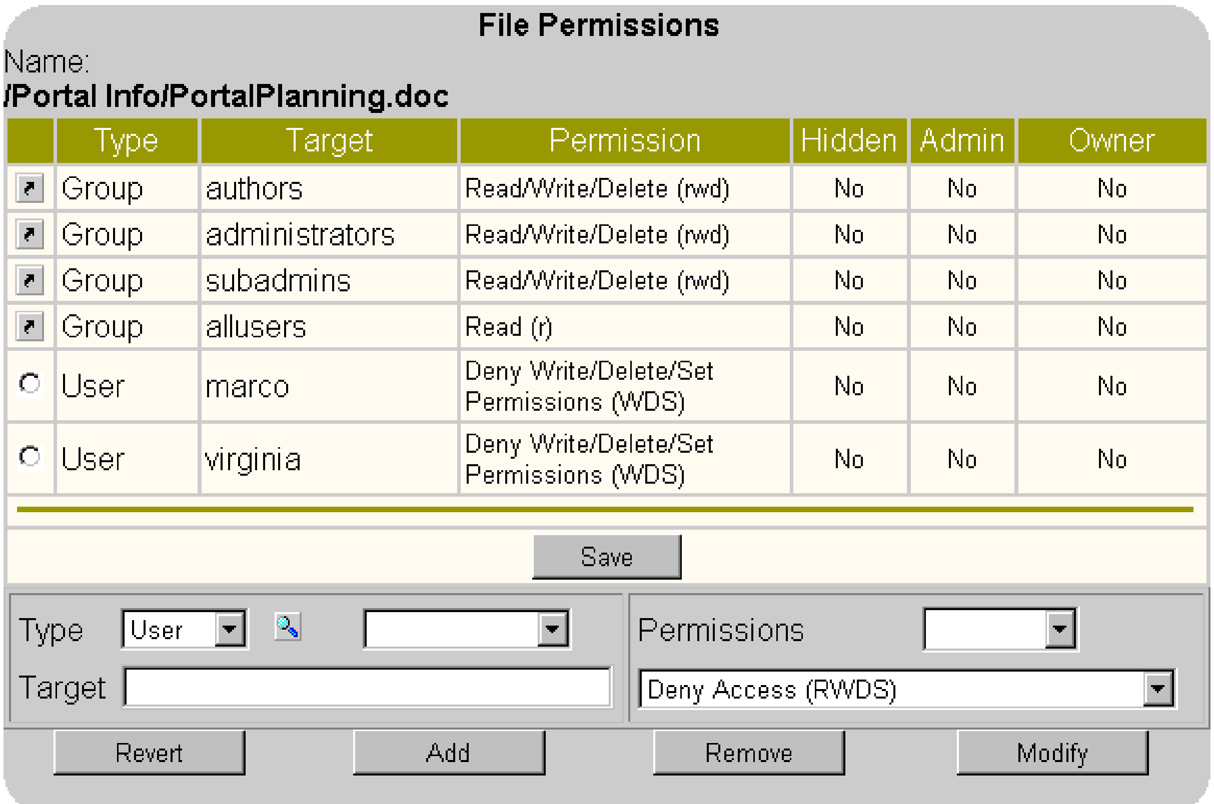
This procedure displays the File Permissions screen for the selected file so you can view the current permissions and select those you wish to remove.

1. In the Content Area, click on the document icon to select it.
   - A check mark displays on the icon:

PortalPlanning.doc   Planning Portal Content

2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Security link.
   - The File Permissions screen displays:



4. Click on the radio button for the user or group permissions you wish to delete.
   - The settings display in the lower (gray) part of the File Permissions screen.
5. Click on the Remove button.
   - The changes display in the File Permissions screen.
6. Click on the Save button.
   - The change is saved and you return to the Category view.

> **Note**
> You must **Save** for the new permissions to take effect.

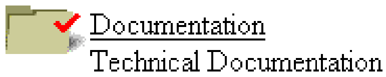
Adding Category Permissions

This procedure displays the Directory Permissions screen for the selected folder so you can view the current permissions and add others.

By system default, all newly-created folders have all permissions denied and are Hidden (not visible to others).

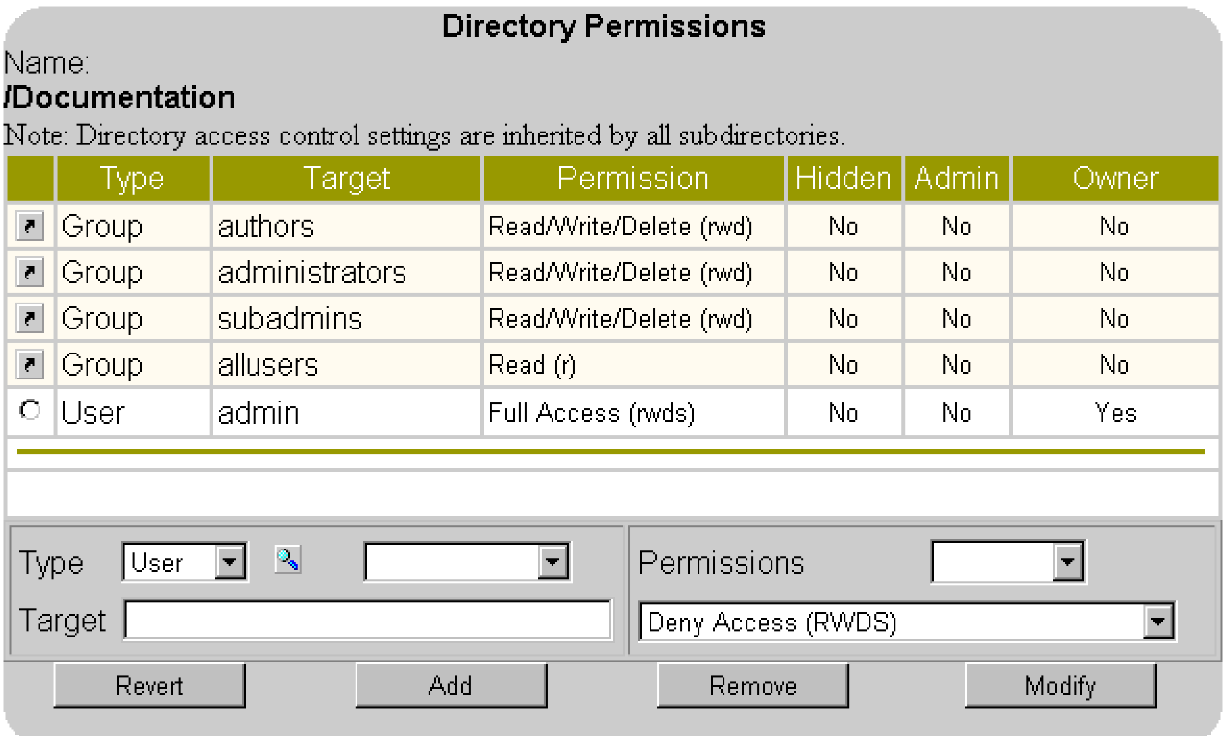
1. In the Content Area, click on the folder icon to select it.

- A check mark displays on the icon:



2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Security link.
   - The Directory Permissions screen displays:



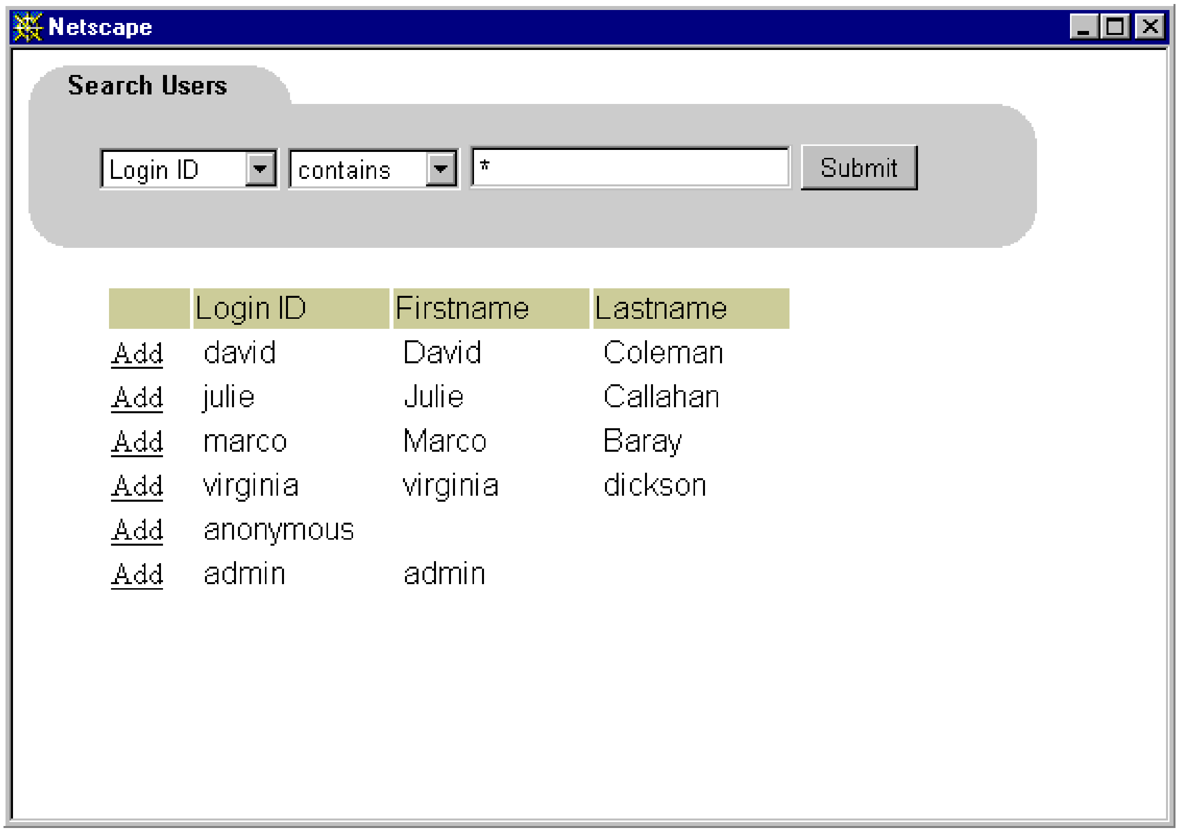
	Type	Target	Permission	Hidden	Admin	Owner
	Group	authors	Read/Write/Delete (rwd)	No	No	No
	Group	administrators	Read/Write/Delete (rwd)	No	No	No
	Group	subadmins	Read/Write/Delete (rwd)	No	No	No
	Group	allusers	Read (r)	No	No	No
	User	admin	Full Access (rwds)	No	No	Yes

   - The upper part of the screen displays the current directory permissions. The icon to the left of the Type field denotes permissions that are inherited from a higher level. If you click on the icon, the permissions in the next higher level display (in the example above, clicking on shows you the permissions set for the Portal Info folder). See “Security (files and folders) Overview,” page 3.42 for details on permission inheritance.
   - The lower part of the screen (in gray) is where you add, change, and remove permissions.

4. Select User or Group from the Type drop-down list.

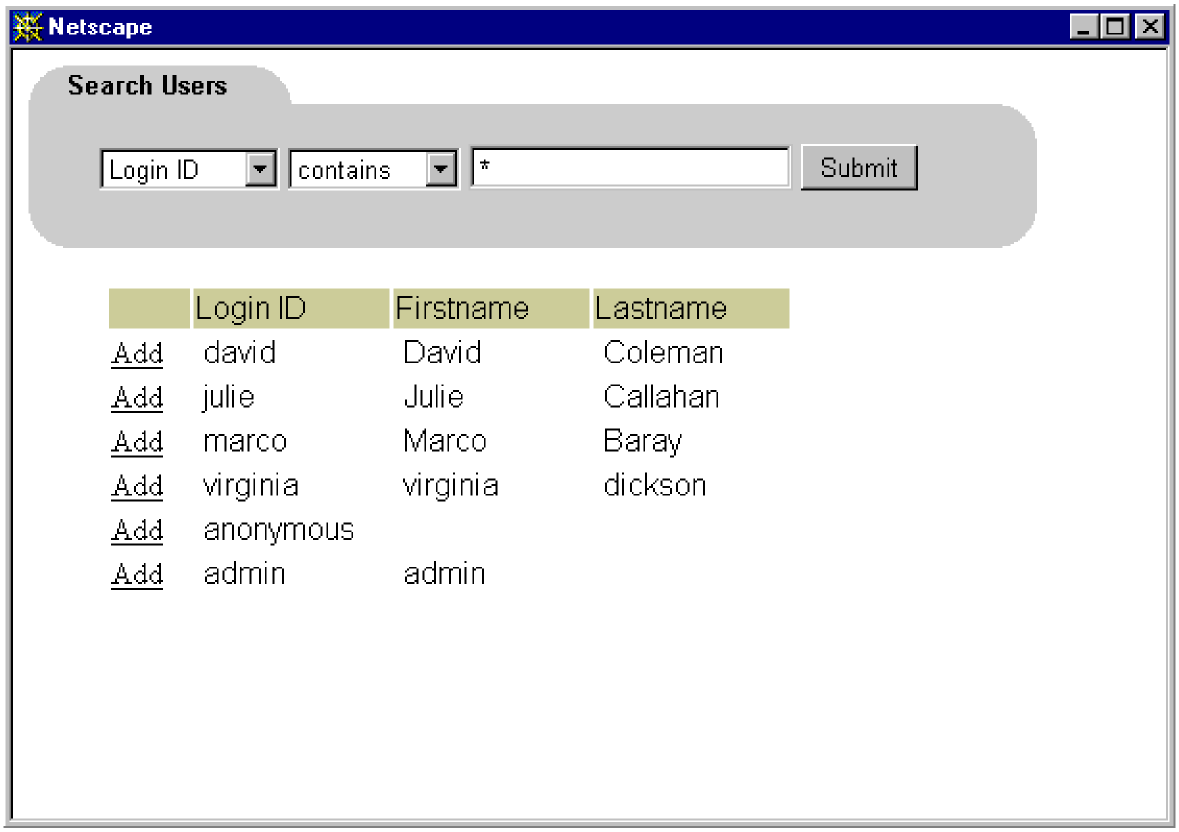
5. Click on the icon to the right of the Type field.

- Depending on whether you selected User or Group, the Search Users or Search Groups screen displays, respectively:



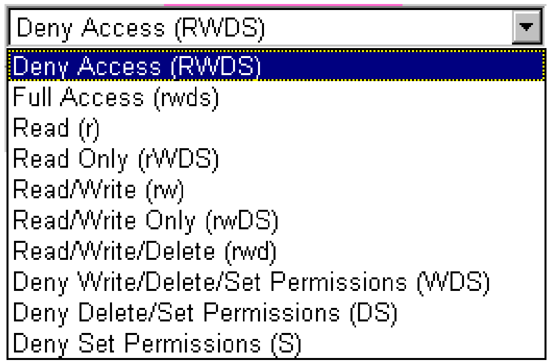
6. Enter your search criteria.
   - See “Search,” page 1.4, “Finding a User,” page 4.17, or “Finding a Group,” page 4.28 for details on searching.
7. Click on the Submit button.

- The search results display:



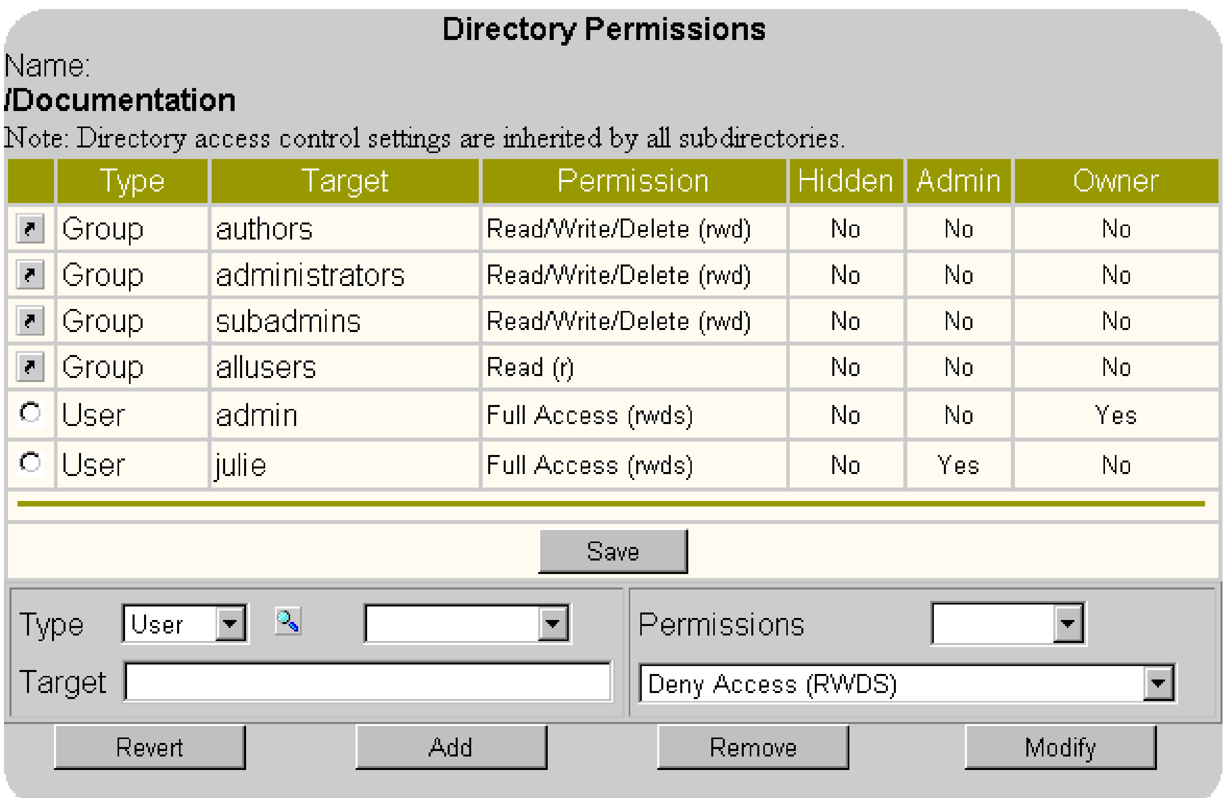
8. Click on the Add link to the left of the user(s) or group(s) you wish to select.
   - You can select multiple users or groups to which to apply permissions.
9. Click on the icon to close the Search window.
   - The ID of the User or Group displays in the Target field.
10. Select Blank, Owner or Administrator from the drop-down list to the right of the icon.
    - The Blank option allows inheritance from higher levels.
    - Owner does not grant any special privileges, but rather has the same privileges as other Content Publishers. It is for informational purposes only, to denote who created the document or folder.
    - Administrator grants Full Access to the folder that cannot be denied except by another Administrator.
11. In the Permissions area, select Blank, Hidden, or Visible from the upper drop-down list.
    - The Blank option allows inheritance from higher levels.
    - The Hidden and Visible options set whether to hide or show the folder to the selected users or groups. Hiding a folder can be used as a shortcut: rather than denying access, then going back and reset permissions to allow access, you can set permissions once, then hide the folder from those particular users or groups until you are ready to grant them access.

12. Select a permission option from the lower drop-down list.



- See “Security (files and folders) Overview,” page 3.42 for explanations of the various permission options.

13. Click on the Add button.
    - The users or groups and their permission settings display in the Directory Permissions window.



> **Note**
> You must **Save** for the new permissions to take effect.

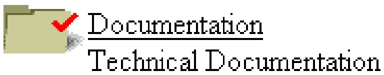
14. Click on the Save button.
    - The change is saved and you return to the Category view.

15. Click on the Refresh button  to deselect the folder icon in the Content Area.

Changing Directory Permissions

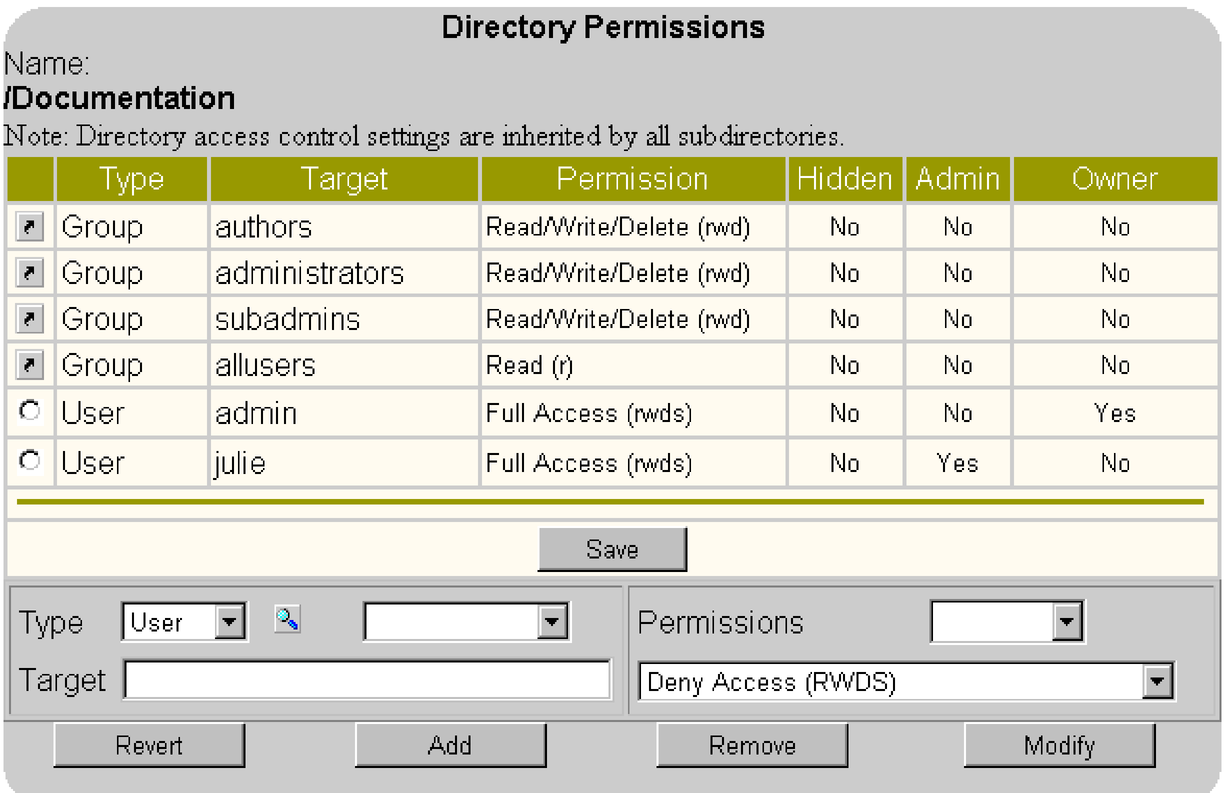
This procedure displays the Directory Permissions screen for the selected folder so you can view the current permissions, select those you wish to change, and make the changes in them.

1. In the Content Area, click on the folder icon to select it.
   - A check mark displays on the icon:



2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Security link.
   - The Directory Permissions screen displays:



	Type	Target	Permission	Hidden	Admin	Owner
	Group	authors	Read/Write/Delete (rwd)	No	No	No
	Group	administrators	Read/Write/Delete (rwd)	No	No	No
	Group	subadmins	Read/Write/Delete (rwd)	No	No	No
	Group	allusers	Read (r)	No	No	No
	User	admin	Full Access (rwds)	No	No	Yes
	User	julie	Full Access (rwds)	No	Yes	No

4. Click on the radio button for the user or group permissions you wish to change.
   - The settings display in the lower (gray) part of the Directory Permissions screen.
5. Enter the appropriate changes.
6. Click on the Modify button.
   - The changes display in the Directory Permissions screen.
7. Click on the Save button.
   - The change is saved and you return to the Category view.

Note

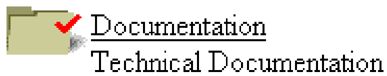
You must **Save** for the new permissions to take effect.

8. Click on the Refresh button  to deselect the document icon in the Content Area.

Removing Directory Permissions

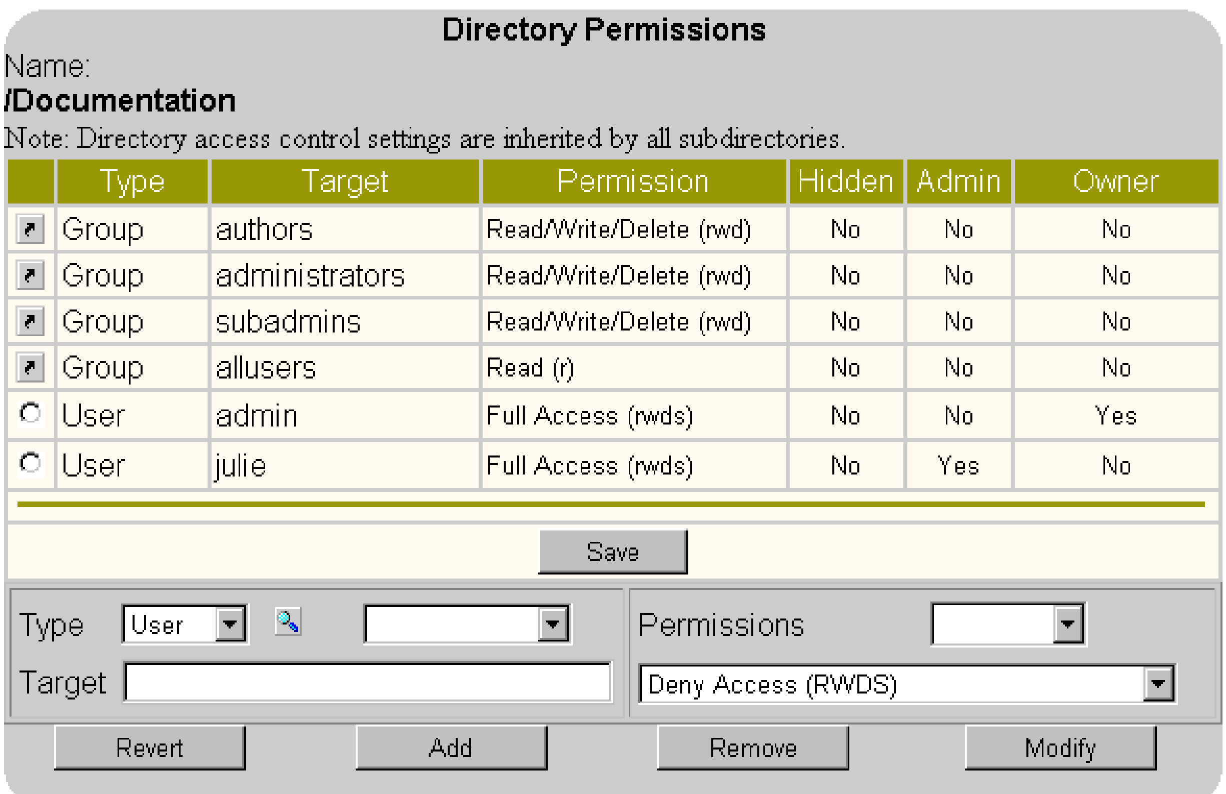
This procedure displays the Directory Permissions screen for the selected folder so you can view the current permissions and select those you wish to remove.

1. In the Content Area, click on the folder icon to select it.
   - A check mark displays on the icon:



2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Security link.
   - The Directory Permissions screen displays:



4. Click on the radio button for the user or group permissions you wish to delete.
   - The settings display in the lower (gray) part of the Directory Permissions screen.
5. Click on the Remove button.
   - The changes display in the Directory Permissions screen.

6. Click on the Save button.
   - The change is saved and you return to the Category view.

Note

You must **Save** for the new permissions to take effect.

Checking PDF and HTML Links

InfoPortal is able to monitor the status of hyperlinks between HTML and PDF *documents within the repository* and, if necessary, fix broken links. When an HTML or PDF document is loaded into the system via Add a Document (see “Adding a Document,” page 3.23), or via WebDAV which is available with the Microsoft Internet Information Server platform of the software, InfoPortal automatically enters any documents into its database. If either the source or target document for a hyperlink is moved within the system, InfoPortal will update the link in the originating document and modify the reference to the target document.

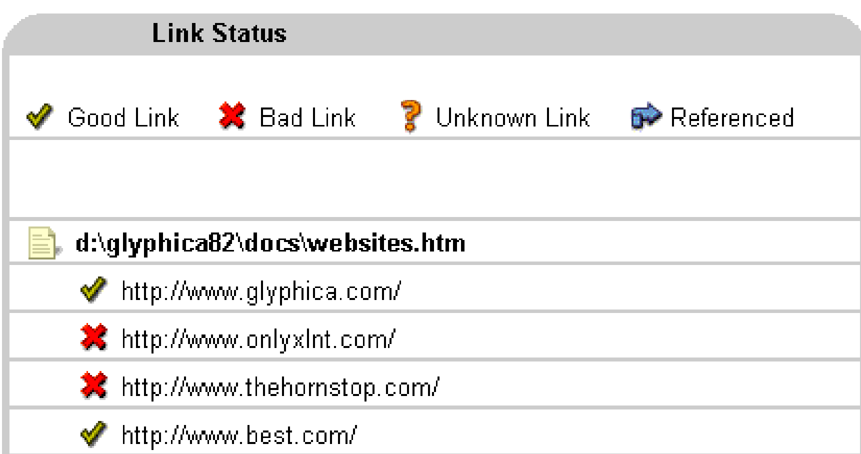
The Check Links function allows the Content Publisher to ascertain that the links in a given document are valid, and also to make sure that any target or originating documents referenced by the document are still available to InfoPortal. InfoPortal is not able to manage links that lead outside of the InfoPortal content repository.

This procedure verifies PDF and HTML links that occur in the selected document. These links can be both internal (the target is inside the same document) and external (the target is outside the document but still within the InfoPortal collection).

1. In the Content Area, click on the document icon to select it.
   - A check mark displays on the icon:

2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Check Links link.
   - The Link Status screen displays:



   - Consult the key at the top of the Link Status screen to determine your results.

Viewing Document Version History

InfoPortal allows Content Publishers to add multiple versions of a document to the system. Version Comments allow a quick mechanism to see differences between versions of a document.

Versions may be viewed only in the Content Publisher view. Other users only have access to search and download the most recent version of the document.

Although InfoPortal stores multiple versions of documents, the only PDF Rendition kept is the most recent one for the latest version of the document. If a PDF Rendition is not made when the newest version is checked in, no PDF icon will display.

There are two ways of adding new Versions of a document:

- Add a Document (using the Add Document function) with the same filename as an existing document to a Category folder where the document exists.
- Check In a document. This allows the documents to have different filenames but still be treated as versions of the same document.

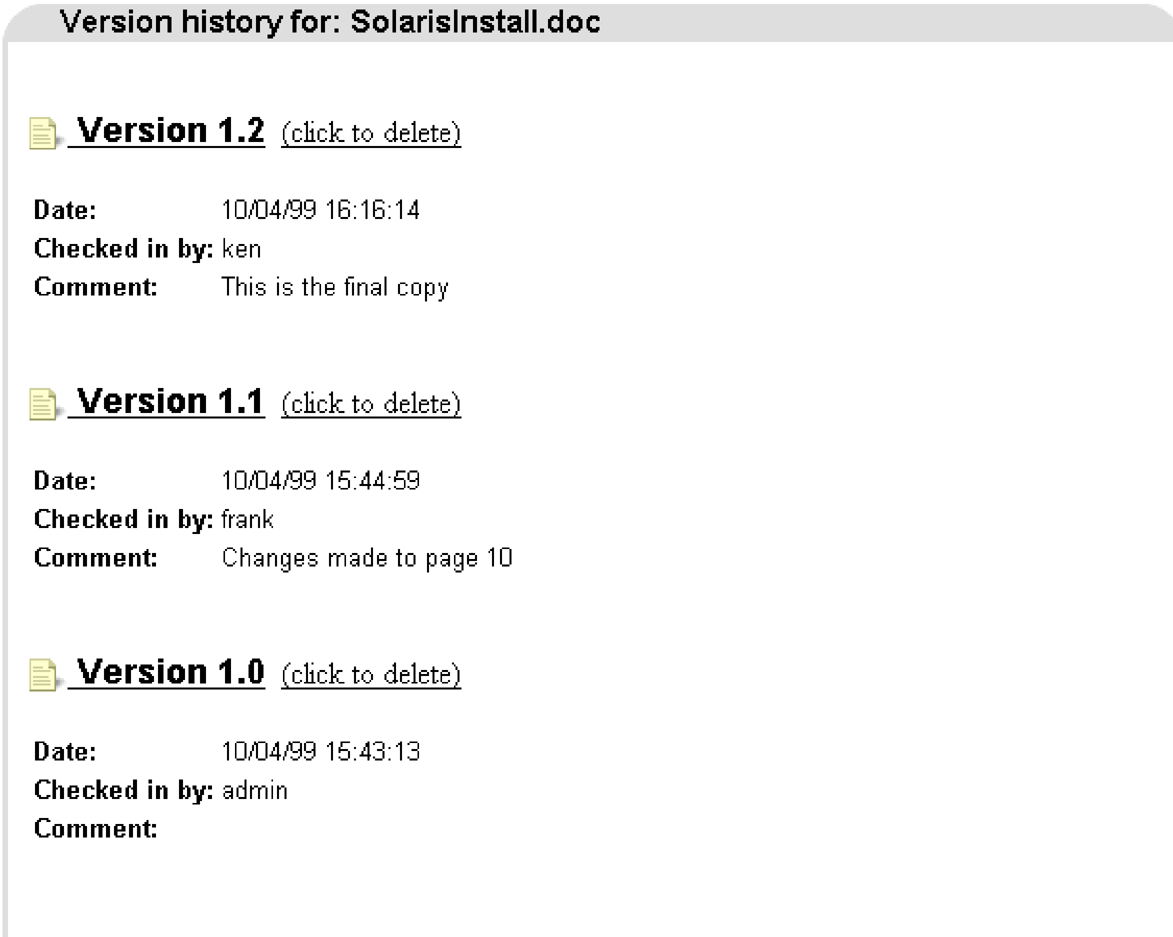
This procedure displays the links to the present and past versions of the selected document.

1. In the Content Area, click on the document icon to select it.
    - A check mark displays on the icon:

2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Version History link.

- The Version History screen displays for the document:



- Versions are listed in chronological order, with the most recent version displayed first. The icon displays to the left of documents that have been deleted.

4. Click on the version link to view the document.

Deleting an Older Document Version

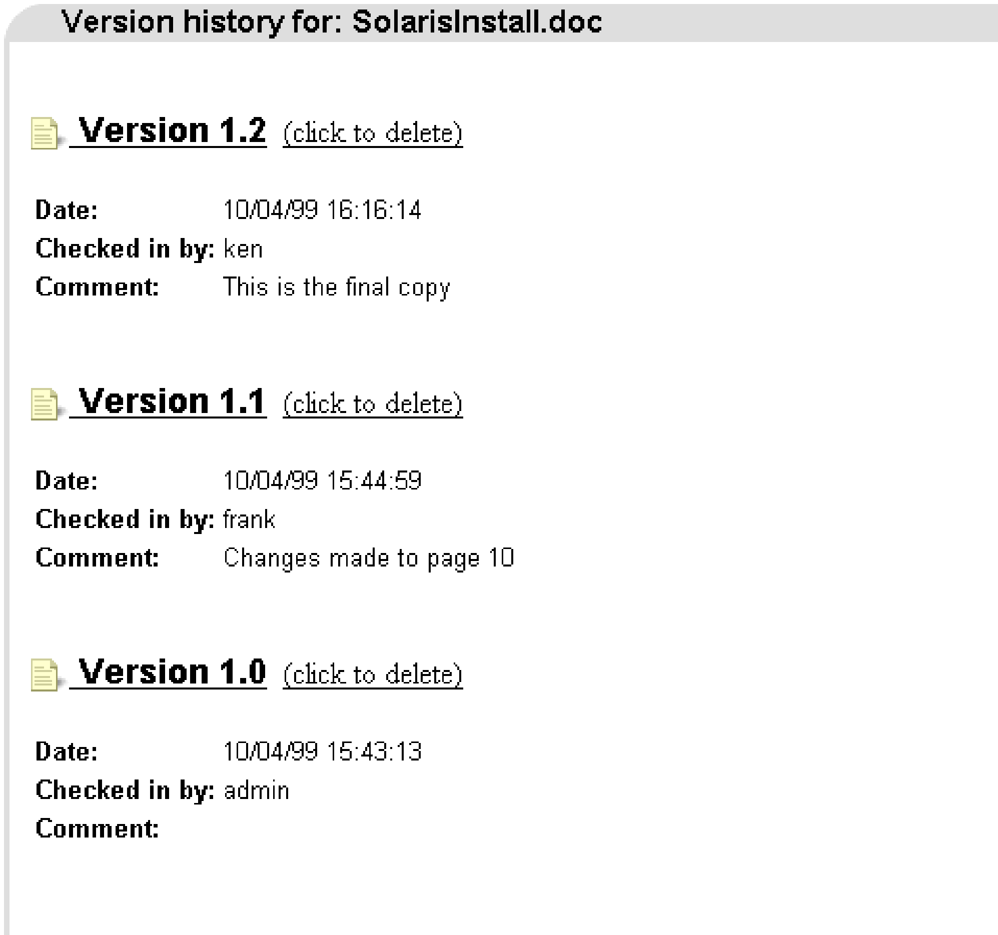
This procedure deletes older versions of a document that are placed under version control.

1. In the Content Area, click on the document icon to select it.
   - A check mark displays on the icon:

2. In the Side Navigation Bar, click on the Properties menu triangle to expand it.

3. Click on the Version History link.

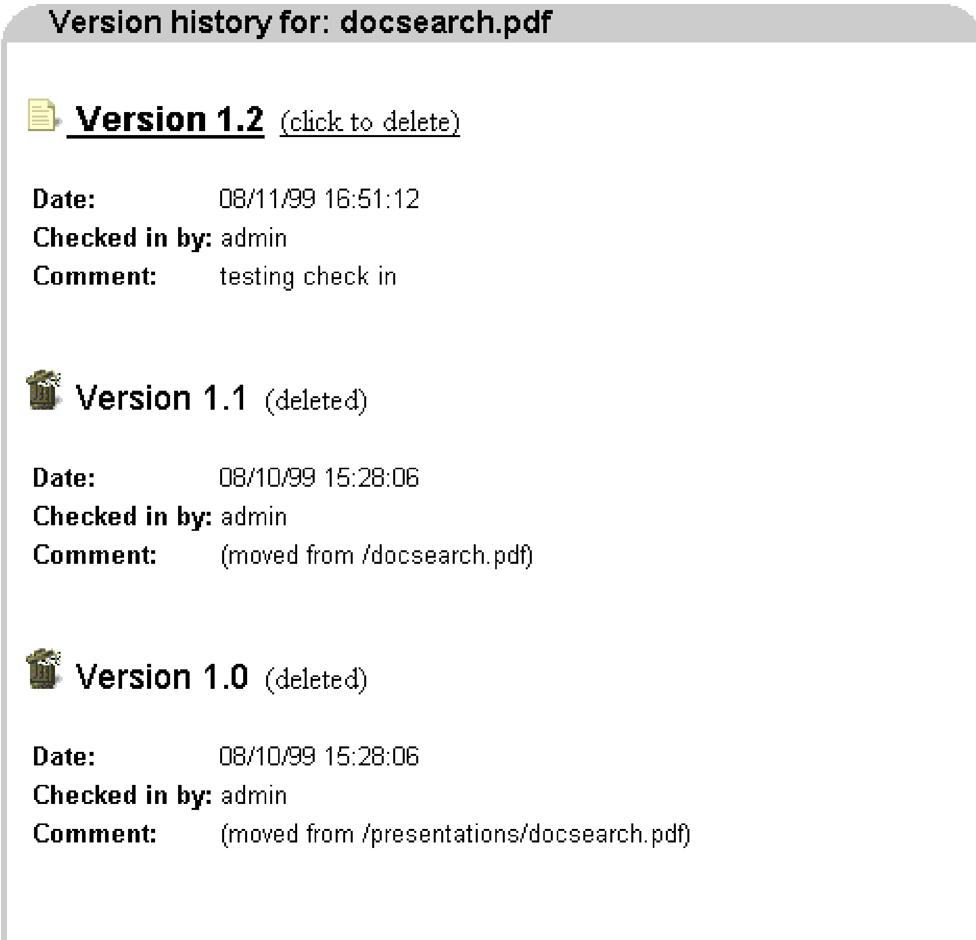
- The Version History screen displays:



4. Click on the Click to Delete link next to the version title.
   - A confirmation message displays:

5. Click on the OK button.

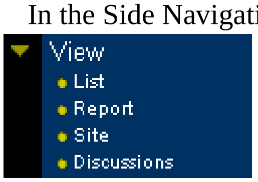
- The link is removed. The  icon displays to the left of document version number, and the word deleted displays to the right. The entry remains in the Version History screen, but you can no longer access the document.



Viewing a List of All Discussions

This procedure displays a list of all Discussion Groups that are in the current directory. (this includes a directory's subdirectories starting from the point in the directory where you are; therefore, if you want to see all Discussion Groups on the InfoPortal, navigate to the home directory first). You can go directly to a specific Discussion Group by clicking on the Discussion title link in the list.

1. In the Side Navigation Bar, click on the View menu triangle to expand it.

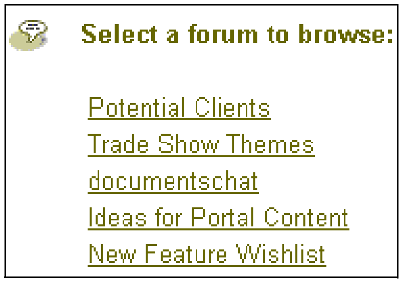


2. Click on the All Discussions link.

Note

Discussions do not appear in User view; they are only visible in the Content Publishing view.

- A list displays of all Discussion Groups on the InfoPortal:



3. Click on a Discussion title link to display the contents of that group.

Viewing a Message

This procedure displays an existing message within a topic. When a Content Publisher clicks on a topic or message link in the Topic/Message area, the message displays in the Message Content area. The Message Content area displays the author of the message, the date the message was posted, the message subject, and the message text. This area is read-only, it cannot be changed. If a file is attached to the message, a link displays to access the file.

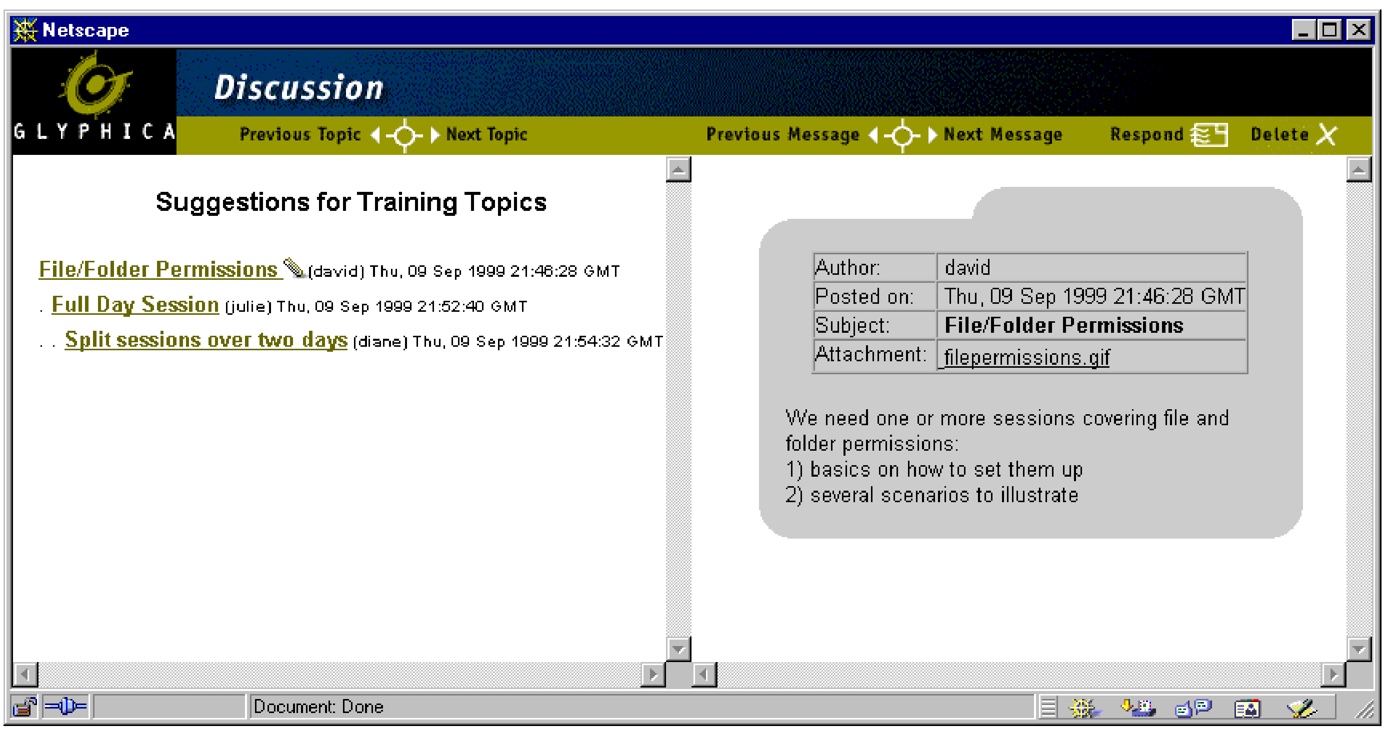
1. Navigate to the appropriate Discussion Group:

2. Click on the appropriate Discussion Group link.
   - Alternatively, you can navigate to the home directory, view all discussions, and click on the appropriate Discussion title link. See “Viewing a List of All Discussions,” page 3.63 for details.
   - The Discussion Group topics display:

3. Click on the topic link that you wish to view.

- The Discussion window displays:

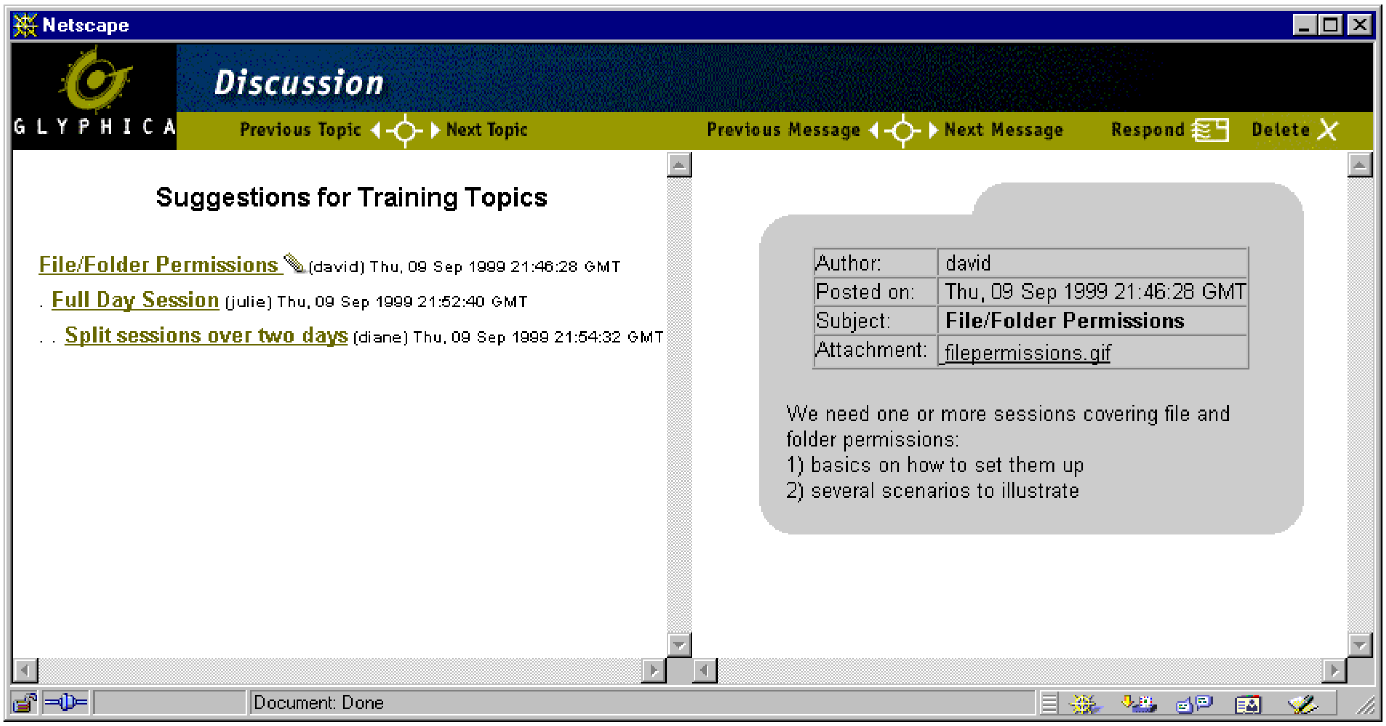
4. In the Topic/Message area (left-hand window), click on the link for the thread you wish to view.
   - The author's comments display in the Message Content area (right-hand window):



Viewing an Attachment

When a Content Publisher clicks on a topic or message link in the Topic/Message area, the message displays in the Message Content area. The message may include an attached file. This procedure displays the attached file.

1. Follow the instructions in “Viewing a Message,” page 3.64 to view the message that contains the attachment.
   - The author’s comments and the attachment link display in the Message Content area (right-hand window):

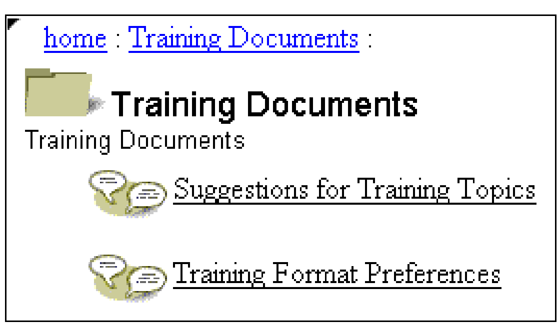


2. Using the right mouse button, click on the attachment link in the Attachment field of the message (Example: filepermissions.gif).
   - The attachment file displays in a separate browser window:
3. Click on the close box to close the attachment window.

Responding to a Topic

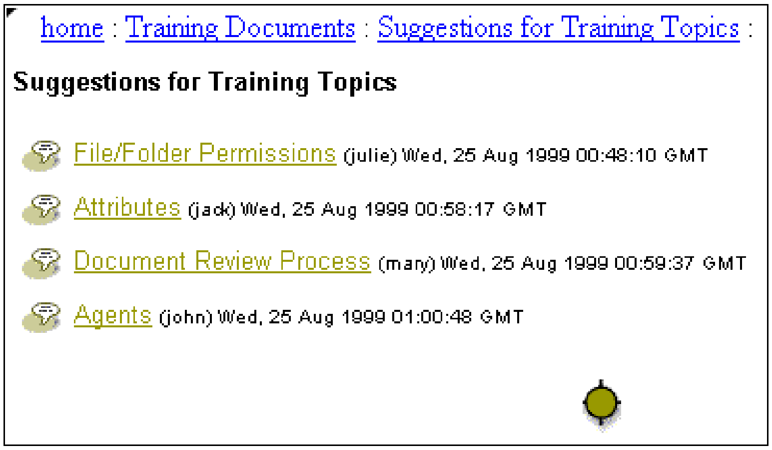
This procedure posts a response to a discussion thread.

1. Navigate to the appropriate Discussion Group:

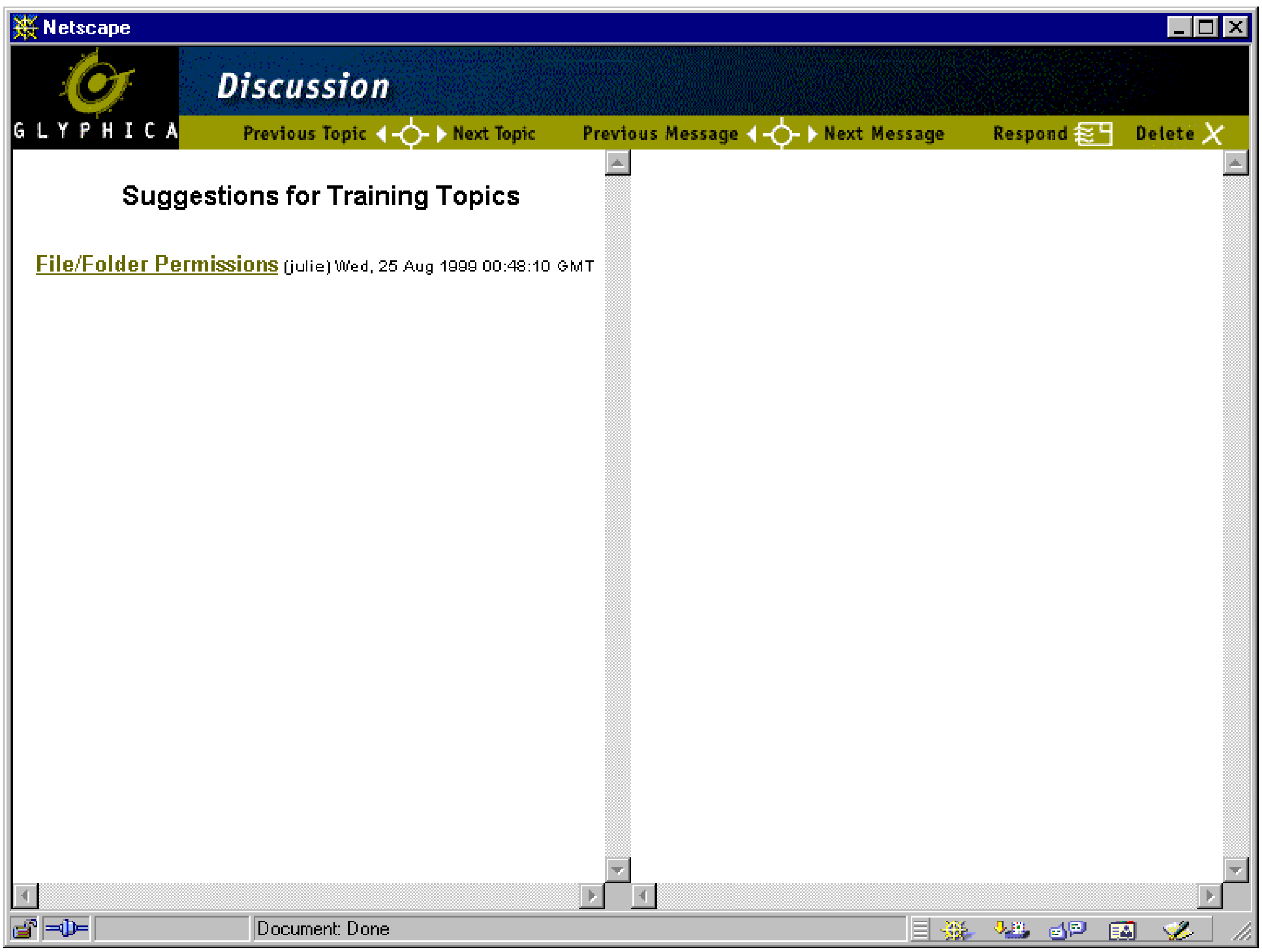


2. Click on the appropriate Discussion Group link.

- Alternatively, you can navigate to the home directory, view all discussions, and click on the appropriate Discussion title link. See “Viewing a List of All Discussions,” page 3.63 for details.
- The Discussion Group topics display:

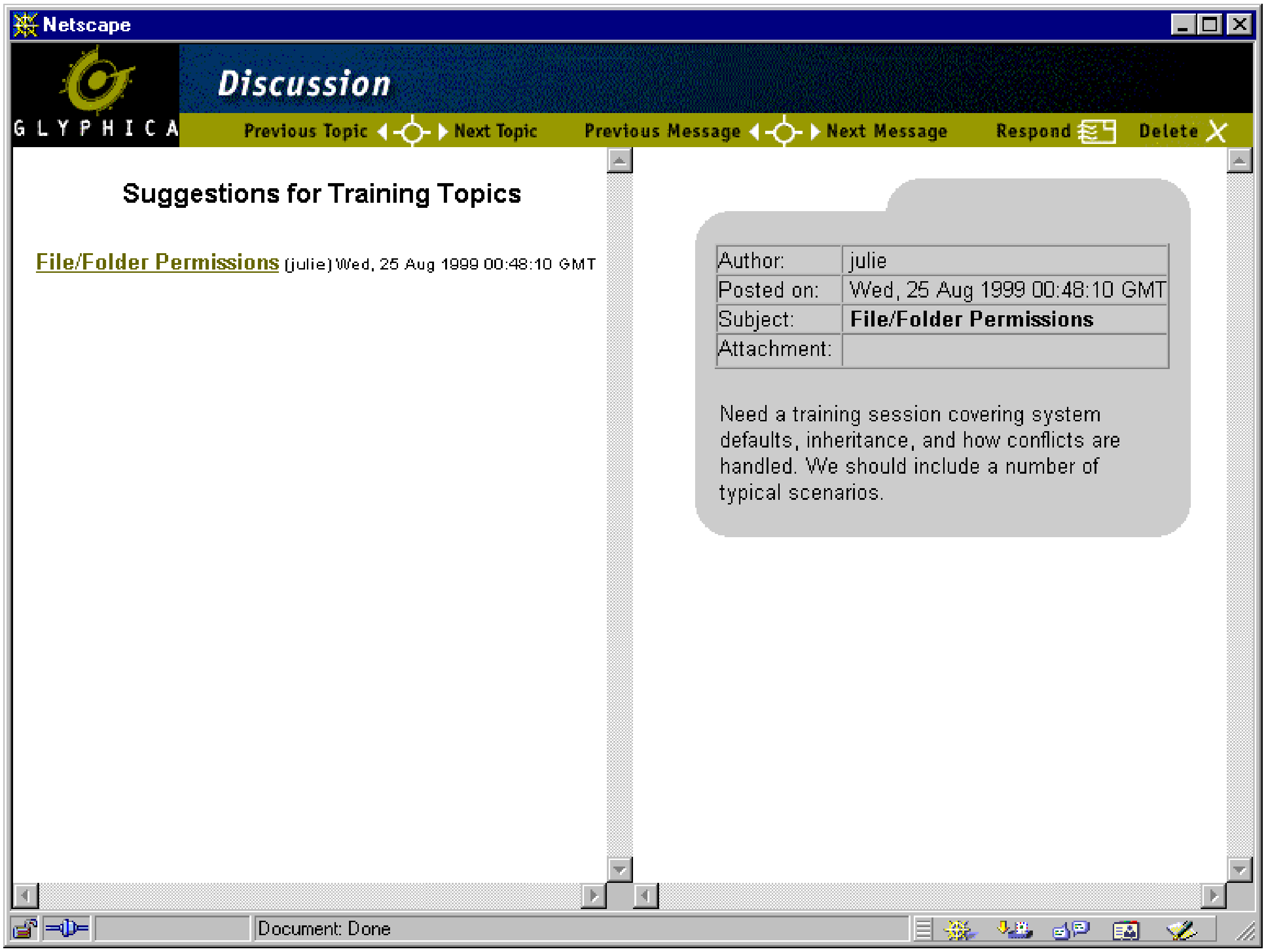


3. Click on the topic link to which you want to respond.
   - The Discussion window displays:



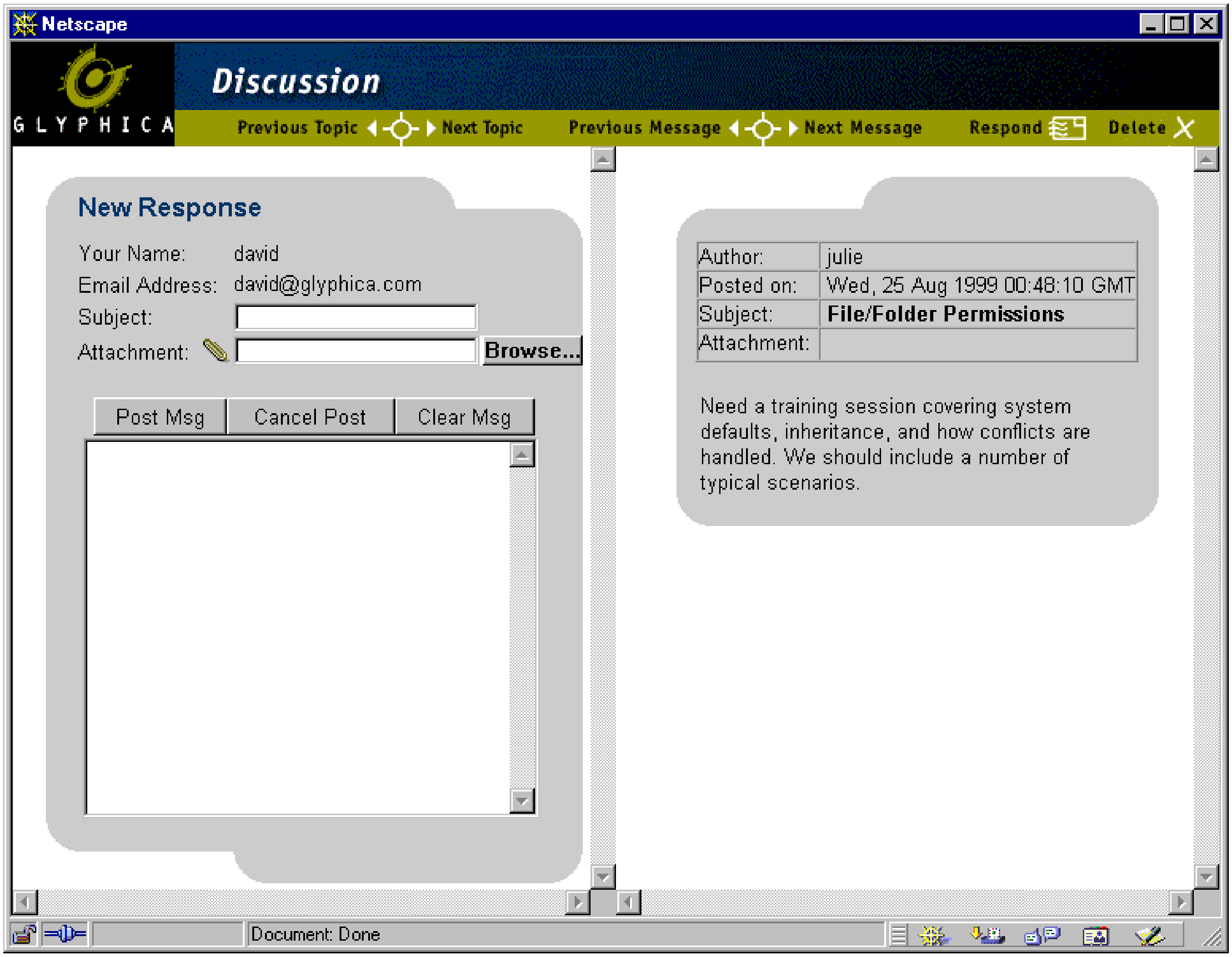
4. Click on the link for the thread to which you want to respond.

- The author's comments display in the right-hand window:



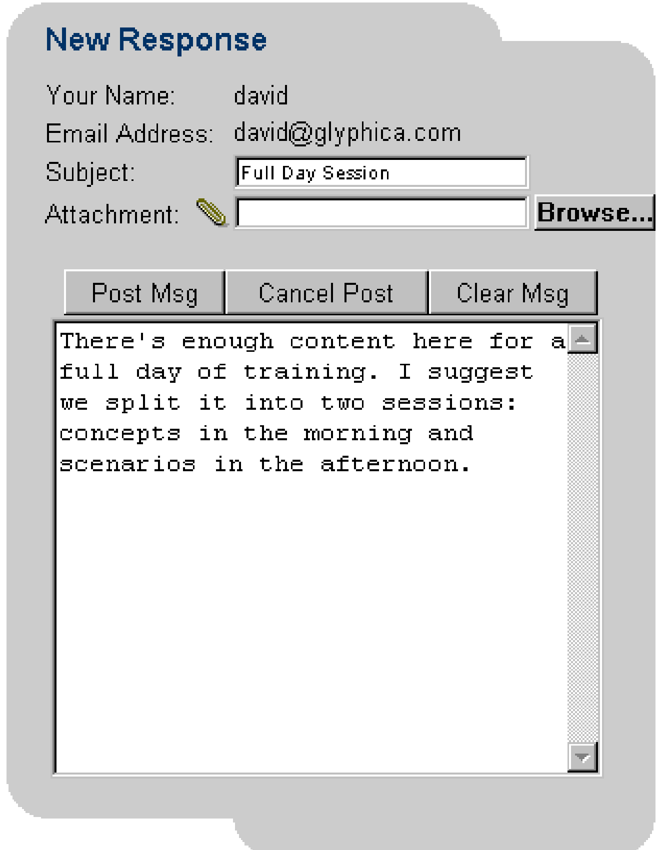
5. Click on the Respond  icon.

- The New Response screen displays in the left-hand window:



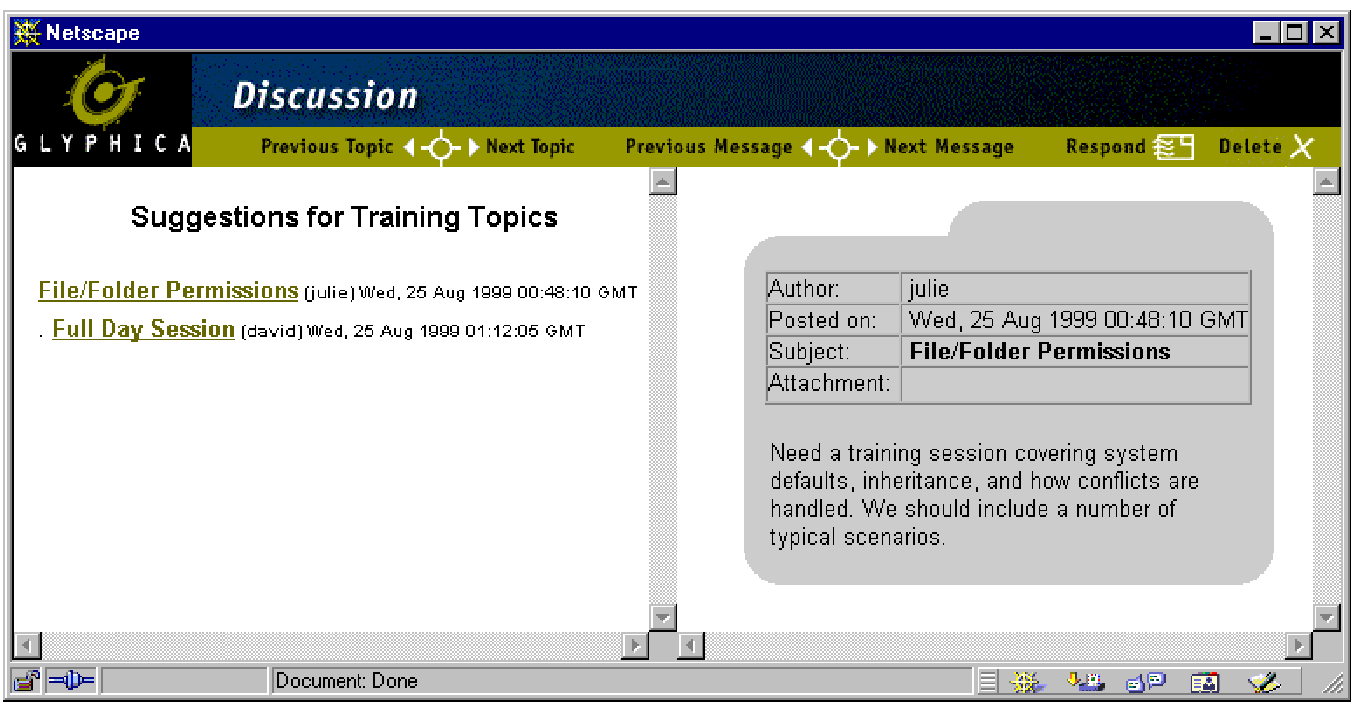
6. Enter a title in the Subject field.

7. Enter your message in the text field below the buttons.



- Note that once a message is posted, only the Site Administrator can delete it.

8. Click on the Post Msg button.
   - Your response displays as a link below the topic in the left-hand window:



9. Use the Navigation Bar buttons to go to other topics and messages.

10. Click on the icon to close the Discussion window.

Generating a PDF Rendition

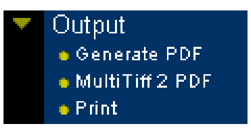
There are two types of Adobe PDF files in InfoPortal: standard PDF, where a PDF original has been uploaded to the Portal; and PDF Rendition, which is created from another document format during the upload process to InfoPortal. If a Glyphica Satellite server is connected to InfoPortal, this procedure may be used to create a PDF Rendition from the following file formats:

- MS Word
- MS Excel
- MS Powerpoint
- TIFF (including multi-page TIFFs)
- Text
- Adobe PageMaker
- Adobe FrameMaker
- PostScript
- HTML

1. Click on a document icon to select it.

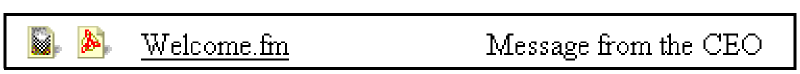
Name	Title	Locked by
Discussion Group Guidelines.htm	Discussion Group Guidelines	
Welcome.fm	Message from the CEO	

2. Click on the Output menu triangle to expand it.



3. Click on Generate PDF.

   - An icon displays that alternates between and . When the PDF is finished generating, the icon displays as .

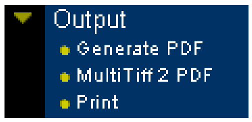


TIFF to PDF Conversions

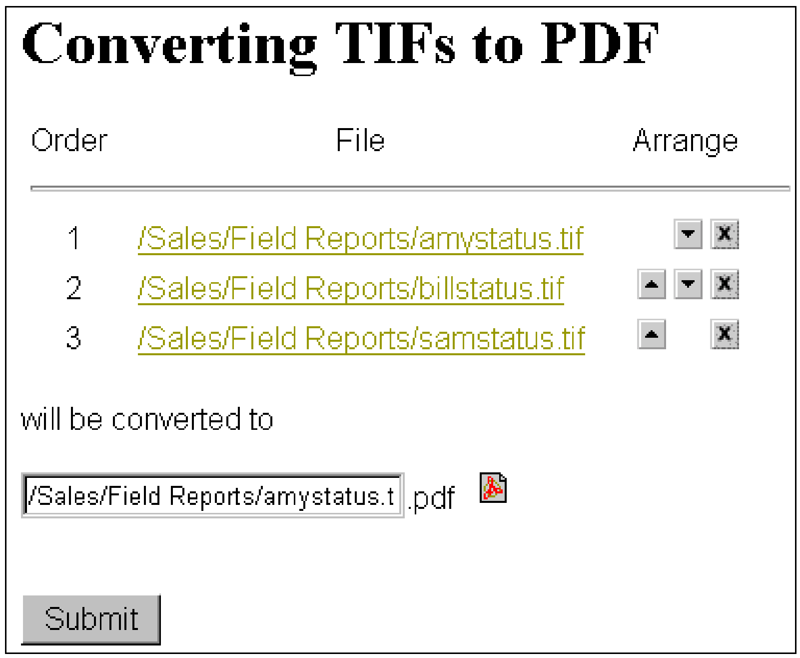
This procedure converts scanned paper documents, in TIFF format, to machine-searchable Image+Text Adobe PDF documents. (This option requires an Adobe Capture hardware key. If this is not installed on the server, this function will not work).

1. Click on one or more document icons to select them.

2. Click on the Output menu triangle to expand it.



3. Click on the MultiTiff 2 PDF link.
   - The Converting Ties to PDF screen displays:



4. Click on the or icon to change the order in which documents are converted.
5. Click on the icon if you want to delete a document from the conversion queue.
   - This does not delete the document, it just tells InfoPortal not to create a PDF Rendition for it.
6. Click on the Submit button.
   - The documents are converted to **one** PDF Rendition as an aggregate of the selected TIFF files. If the documents fail to convert, this message displays:

   - You must contact your Site Administrator to find out why this process failed.

Delete PDF Rendition Files

There are two types of PDF files in InfoPortal: standard PDF, and PDF Rendition, which is created from another document format.

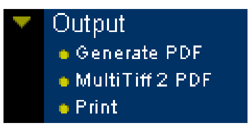
You delete a standard PDF file just like you delete other uploaded files (see “Deleting a Document or Folder,” page 3.27 for details). You can delete a PDF Rendition in two ways:

- Deleting the original document, which also deletes the PDF Rendition (see “Deleting a Document or Folder,” page 3.27).
- Re-uploading the original document and not making a Rendition (see “Adding a Document,” page 3.23).

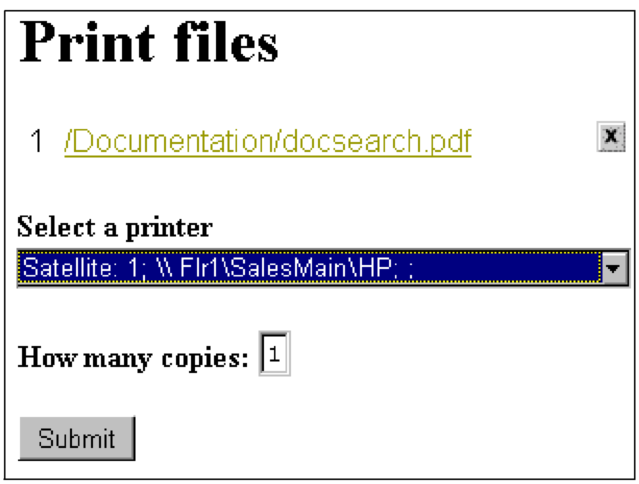
Printing a Single Document

InfoPortal allows Content Publishers to select a particular document and request the InfoPortal Server to print the document to a network-attached or hardware-attached printer. InfoPortal can print only documents that are either PDF format or one of the document types that InfoPortal supports for conversion: MS Word, MS Excel, MS PowerPoint, Adobe PageMaker, Adobe FrameMaker, plain text, HTML, and Postscript. Printing is not available unless a Glyphica Satellite Server is connected to InfoPortal.

1. Click on a document icon to select it.
2. Click on the Output menu triangle to expand it.



3. Click on Print.
   - The Print Files screen displays:



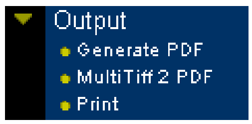
   - (Click on the icon if you change your mind and do not want to print the document.)
4. Select a printer from the Select a Printer drop-down list.
5. Type a number in the How Many Copies field if you want more than one.
6. Click on Submit.

- The document prints and the Print Files screen disappears from the Content Area.

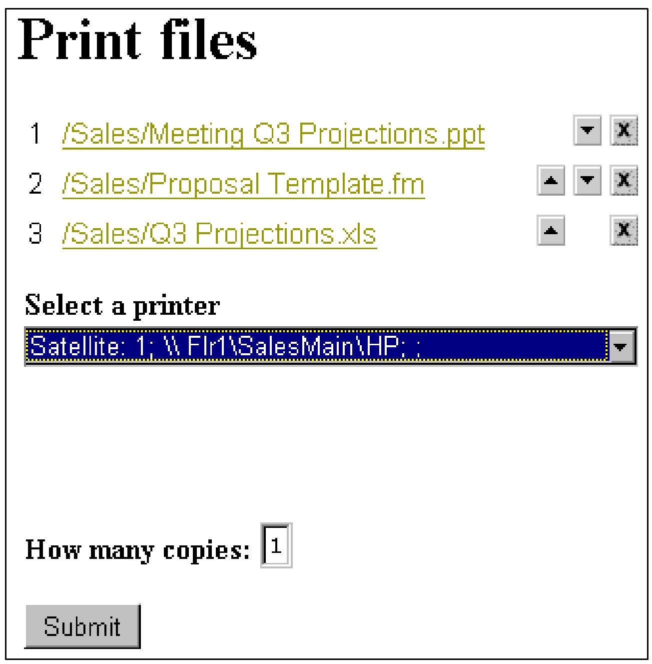
Printing Multiple Documents

InfoPortal allows Content Publishers to select a folder and request the InfoPortal Server to print all the documents in that folder to a network-attached or hardware-attached printer. InfoPortal can print only documents that are either PDF format or one of the document types that InfoPortal supports: MS Word, MS Excel, MS PowerPoint, Adobe PageMaker, Adobe FrameMaker, plain text, HTML, and Postscript.

1. Click on the document icons to select them.
2. Click on the Output menu triangle to expand it.

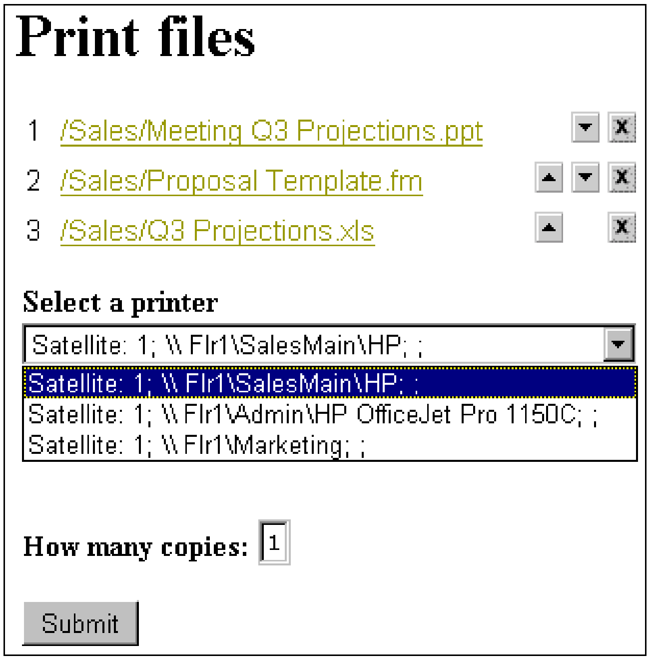


3. Click on Print.
   - The Print Files screen displays:



4. Click on the or icon to change the order in which documents print.
5. Click on the icon if you want to delete a document from the print queue.

6. Select a printer from the Select a Printer drop-down list.



- The files can be sent to an attached printer or any printer available on the network.
- The items that appear between the ; are designated by the system administrator for that particular printer. These areas are the description and location areas of the printers as entered on the printer software itself.

7. Type a number in the How Many Copies field if you want more than one.
8. Click on Submit.
   - The documents print and the Print Files screen disappears from the Content Area.

Subscribing to a Document or Folder

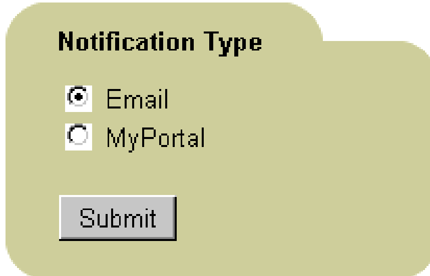
Subscribing to a Document or a Folder is essentially setting notification for yourself on this item, should something be modified or added. Subscription notifications appear in the Subscriptions box of each Content Publisher's My Portal view, or are sent to the Subscriber via standard email. (See “My Portal,” page 2.1 for information concerning My Portal views.)

1. Click on the document or folder icon to select it.

2. Click on the File menu to expand it.

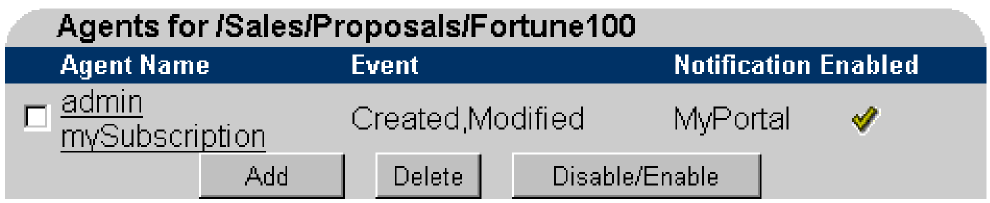
3. Click on Subscribe subription under new.

- The Notification Type screen displays.



4. If you wish to have the notification concerning this document or folder sent to you via email, choose Email. If you wish to see the notification in your My Portal view, choose MyPortal.
5. Click on Submit.
   - You return to the document directory.
6. Click on the Refresh button 

in the Top Navigation Bar to uncheck the document or folder icon.
   - Subscribing automatically creates an Agent:



   - See "Editing an Agent," page 3.85 for details on modifying the subscription agent.

Changing or Deleting a Subscription

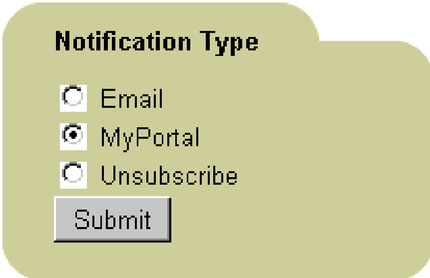
This procedure can be used to change to another notification type, or to unsubscribe from the document or folder.

1. Click on the document or folder icon to select it.

2. Click on the Subscription menu to expand it.

3. Click on Edit.

- The Notification Type screen displays:



- The third option, Unsubscribe, only shows on items that are already subscribed to by that Content Publisher.

4. Choose the appropriate option.
5. Click on Submit.
    - If you selected Unsubscribe, a confirmation message displays:

6. Click on the OK button.
    - You return to the document directory.
7. Click on the Refresh button 

in the Top Navigation Bar to uncheck the document or folder icon.

Agent Overview

Agents are a powerful workflow tool included with the InfoPortal package. A basic overview of Agents is as system-resident queries or “watchers” that can monitor activities associated with Categories or individual documents in the system, and then send notifications to Users or Groups concerning those activities.

There are two types of Agents: Document Agents and Folder Agents. Document agents can “watch” a particular document for changes, modifications, movement, deletions, etc. and notify the Agent's targets (the original setter of the Agent, and anyone named to the Agent as an interested party). A Folder Agent is even more powerful. It can monitor the status of items within the entire Category and execute searches on any documents that are modified, deleted, added, copied, etc. If the search criteria are satisfied, then the Agent sends a customizable message to the target audience.

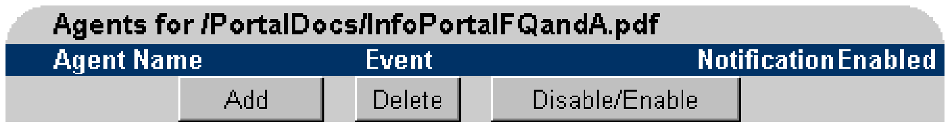
Creating a Document Agent

This procedure creates an Agent for a document.

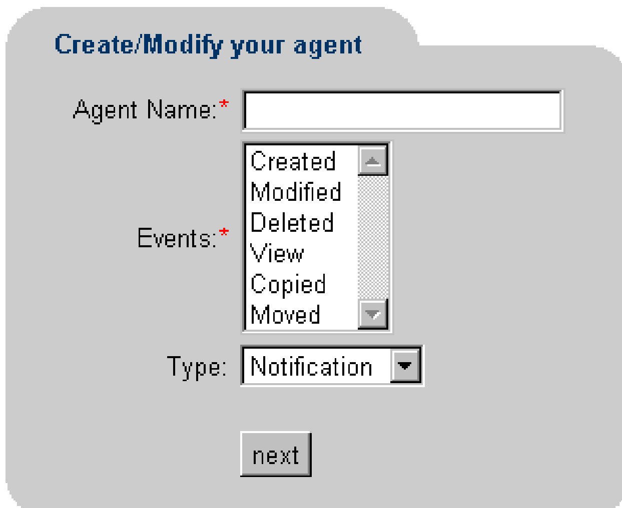
1. Click on a document icon to select it.

2. Click on the Agent menu.

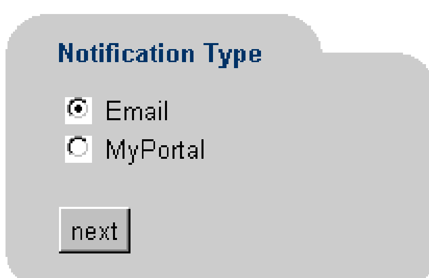
   • The Agents screen displays:



3. Click on the Add button.
   • The Create/Modify Your Agent screen displays:



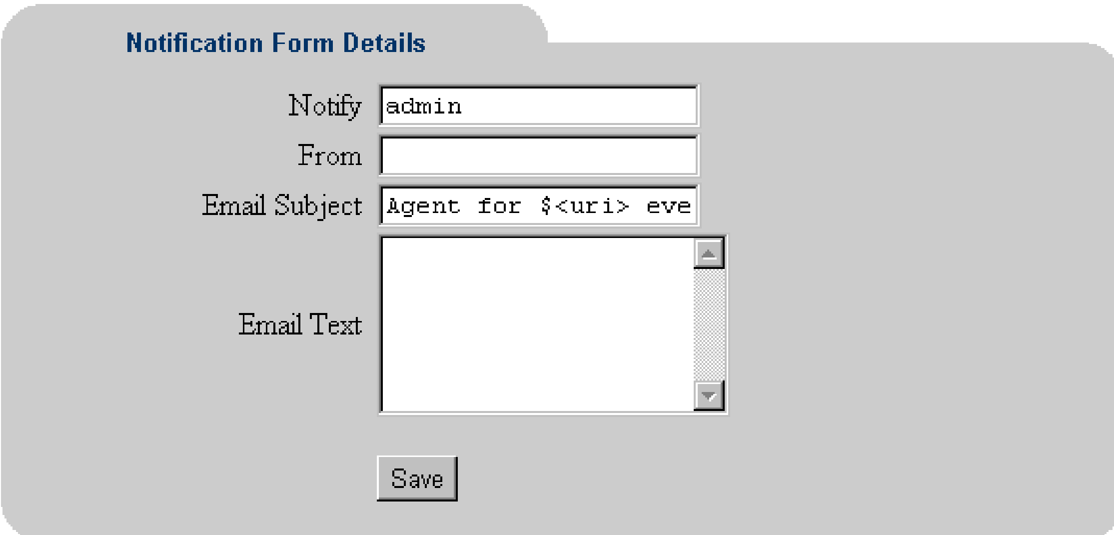
4. Type a name in the Agent Name field.
5. Click on the event(s) for which you will receive notification.
   • Use Shift+click to select items next to each other; use Control+click to select items that are not next to each other.
6. Click on Next.
   • The Notification Type screen displays:



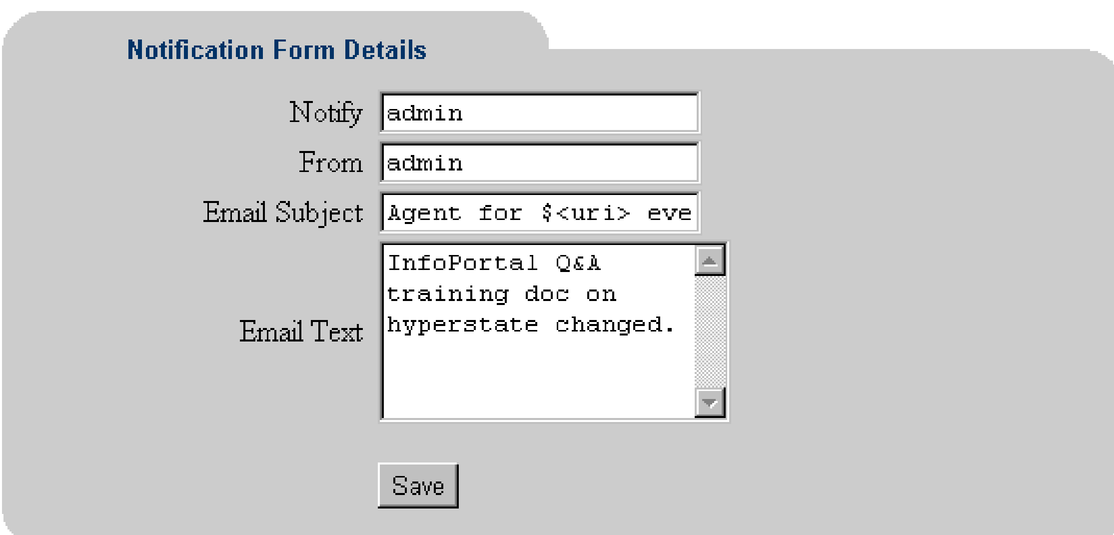
7. If you wish to have the notification concerning this document or folder sent to your My Portal view, choose MyPortal. If you wish to send notification via email, choose Email.

- The MyPortal option sends notification only to the person creating the Agent; the Email option allows notification to be sent to multiple users.

8. Click on Next.
   - If you selected MyPortal, the agent is created and automatically enabled at this point. If you selected Email, the Notification Form Details screen displays:

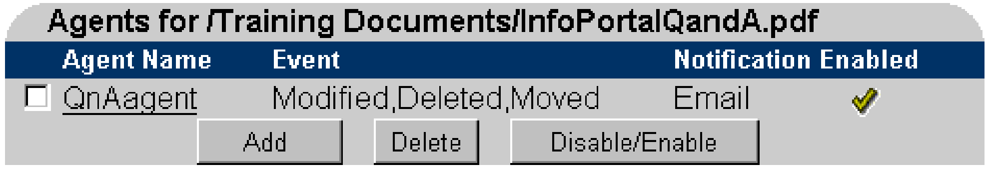


9. Type the ID(s) of the user(s) and/or group(s) who will receive notification of the event in the Notify field.
10. Type your user ID in the From field.
11. If you wish, enter a different subject heading in the Email Subject field.
    - The default message shown is a script that gives notification of the event from the list of events you chose in Step 17.
12. Type any appropriate text in the Email Text field.



13. Click on the Save button.

- The agent is created and automatically enabled.



14. Click on the Refresh button 

in the Top Navigation Bar to uncheck the document icon in the Content Area.

Creating a Folder Agent

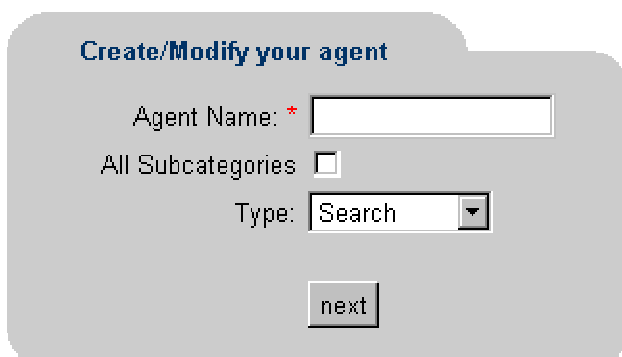
This procedure creates an Agent for a folder. The process is more involved than creating a Document Agent, but it offers an additional search criteria.

1. Click on the folder icon to select it.

2. Click on the Agent menu.

- The Agents screen displays:

3. Click on the Add button.
   - The Create/Modify Your Agent screen displays:

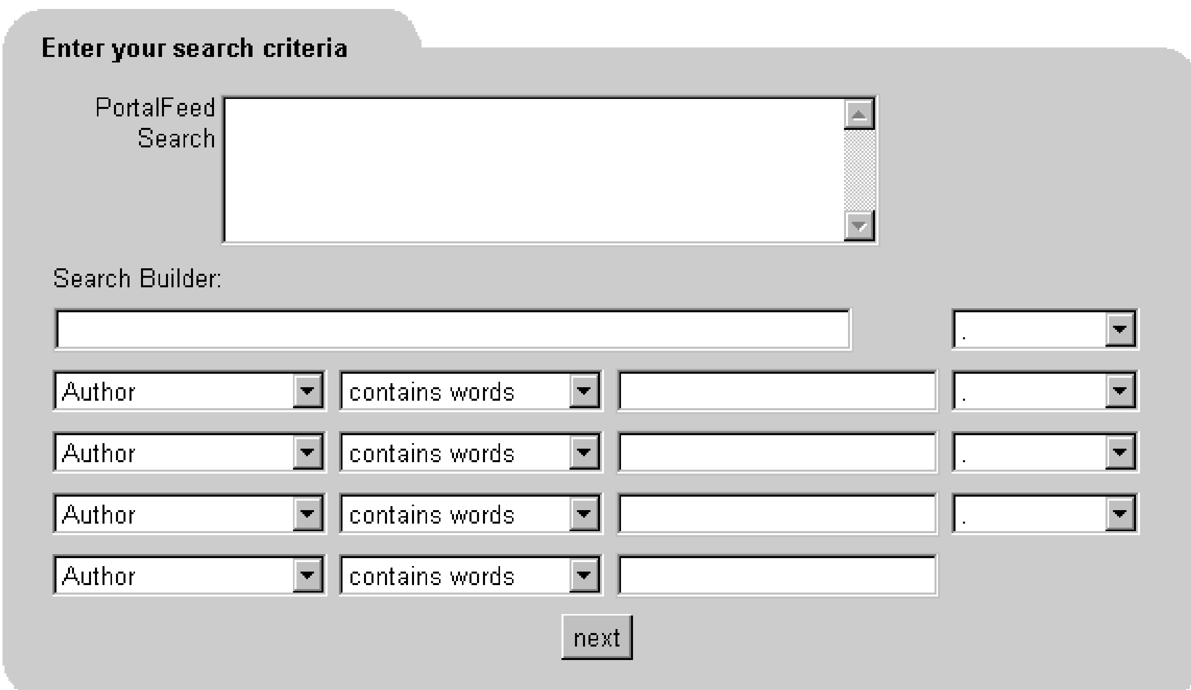


4. Type a name in the Agent Name field.
5. Click in the All Subcategories check box if you also want notification from folders contained within this folder.

6. Select Search or Notification from the Type drop-down list.

Type	Explanation
Search	Displays the Search Builder, which allows Content Publishers to set query parameters on the Agent. When a selected action occurs in the Category folder (Search Builder queries may **not** be set for individual documents, only for actions), the Agent runs the Search Builder query against the document(s) to see if the changes include new information of interest to the Content Publisher or Group.
Notification	Tells the Agent to send an email or My Portal message to the user(s) and/or group(s) specified in the Details screen.

7. If you selected Notification, skip to Step 16. If you selected Search, continue with the next step.
8. Click on Next.
   - If you selected Search, the Search Criteria screen displays:

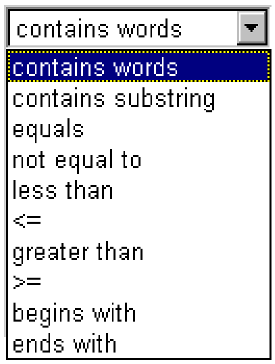


   - The Search parameters that you select in the steps below display in the Portal-Feed Search box.
9. Enter a word or phrase for your search criteria.
10. Select from the concept operator drop-down list (accrue with, and, or) if you wish to combine this part of the search with other search criteria. Otherwise, the period indicates the end of the search string.

Selection	Search Results
Period	Ends the search string.
Accrue with	Selects documents that include at least one of the search elements you specify. The more search elements present, the higher the priority for selecting the document.
And	Selects documents that contain all of the search elements you specify.
Or	Selects documents that show evidence of at least one of your search elements.

11. Select metadata fields from the first set of drop-down lists.
    - The list is dynamically generated by the attributes currently existing in the database, so what you see may be different than what displays here:

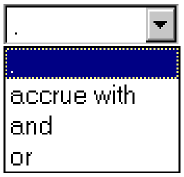
12. Select the appropriate relational operator from the second set of drop-down lists.



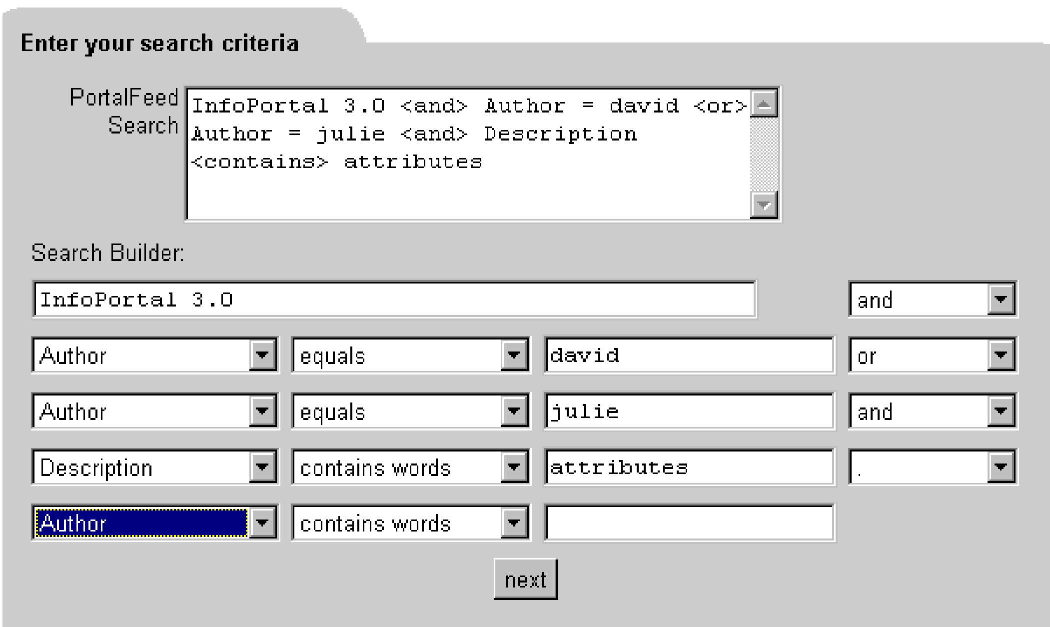
- The following table describes these relational operators:

Selection	Search Results
contains words	Selects documents by matching the word or phrase you specify with the values stored in a specific document field. Documents are selected only if the search elements specified appear in the same sequential and contiguous order in the field value.
contains substring	Selects documents by matching the character string you specify with a portion of the strings of the values stored in a specific document field.
equals	Selects documents whose document field values are exactly the same as the search string you specify.
not equal to	Excludes documents whose document field values are exactly the same as the search string you specify.
less than	Selects documents whose document field values are less than the search string you specify.
<=	Selects documents whose document field values are less than or equal to the search string you specify.
greater than	Selects documents whose document field values are greater than the search string you specify.
>=	Selects documents whose document field values are greater than or equal to the search string you specify.
begins with	Selects documents by matching the character string you specify with the beginning characters of the values stored in a specific document field.
ends with	Selects documents by matching the character string you specify with the ending characters of the values stored in a specific document field.

13. Select an item from the second concept operator drop-down list (accrue with, and, or) if you wish to combine this part of the search with other search criteria. Otherwise, the period indicates the end of the search string.

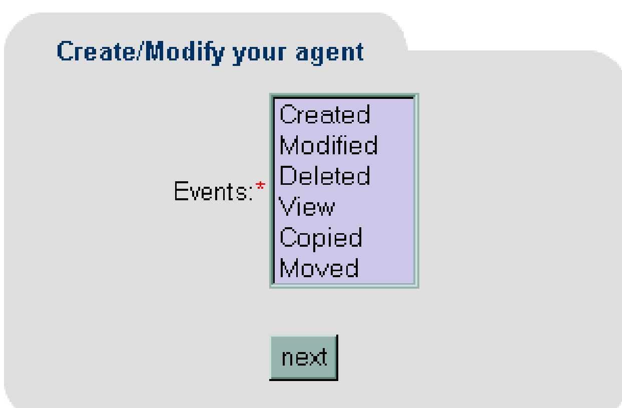


14. Repeat Steps 3 through 5 for each line until you are finished setting up your search criteria.
15. The search criteria displays in the PortalFeed Search field:



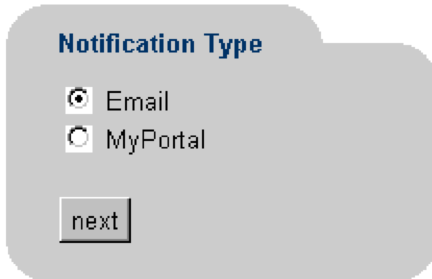
- You can modify the text of the search directly in the PortalFeed Search box as well.

16. Click on Next.
    - The Create/Modify Your Agent screen displays the Events field:

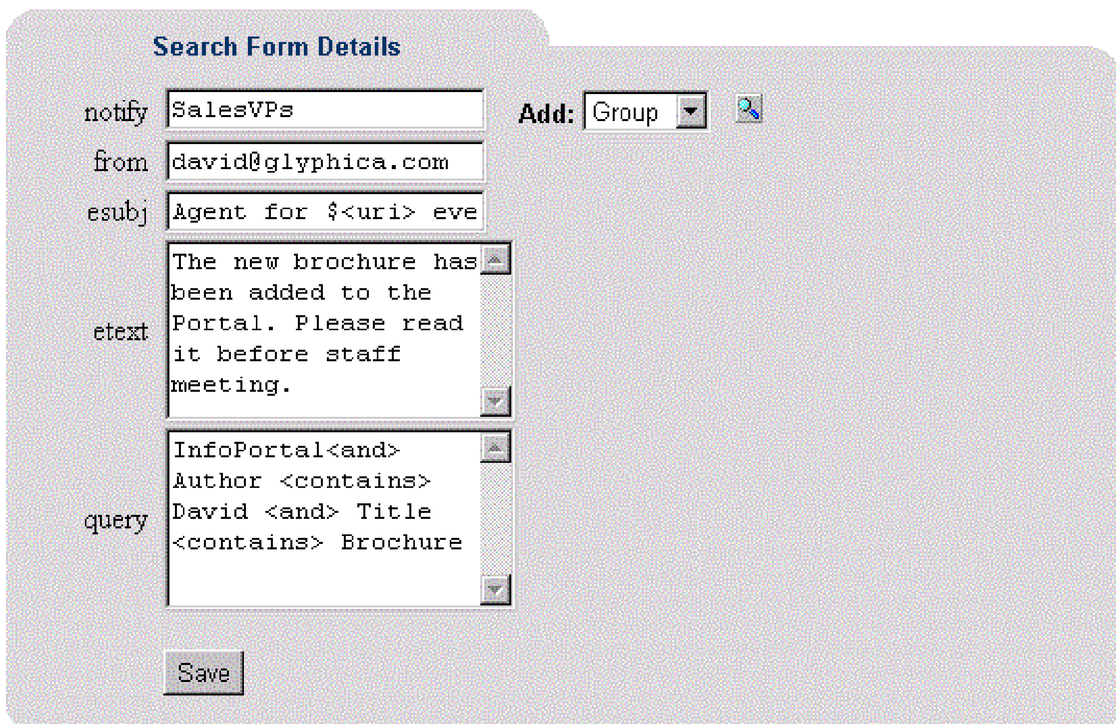


17. Click on the event(s) for which you will receive notification (use Shift+click to select items next to each other; Control+click to select items that are not next to each other).

18. Click on Next.
    - The Notification Type screen displays:

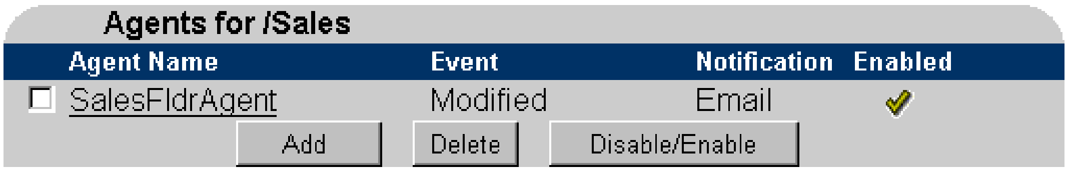


19. If you wish to have the notification concerning this document or folder sent to you via email, choose Email. If you wish to see the notification in your My Portal view, choose MyPortal.
20. Click on Next.
    - If you selected Email, the Search Form Details screen displays:



21. Click on the icon.
    - The Search Users or Search Groups screen displays.
22. Click the Add link next to the user(s) you want to add to the notification list.
23. Click on the X icon to close the Search Users window.
24. If you want to notify a all the menebers of a specific group, click on the Add drop-down list and select Group.
    - You may select a combination of individuals and groups for the Notify field.
    - The Search Groups screen displays.
25. Click the Add link next to the group(s) you want to add to the notification list.
26. Click on the X icon to close the Search Groups window.

27. Type your user ID in the From field.
28. Type a subject heading in the Email Subject field.
29. Type any appropriate text in the Email Text field.
30. Click on the Save button.
    - The agent is created and automatically enabled.



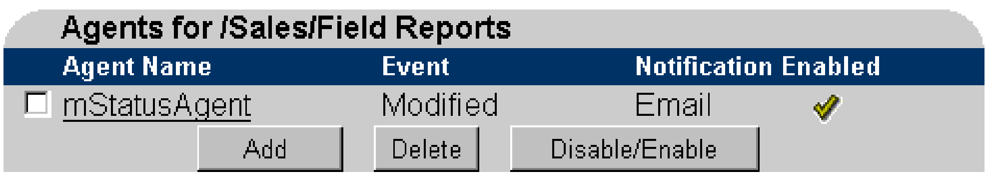
31. Click on the Refresh button 

in the Top Navigation Bar to uncheck the folder icon.

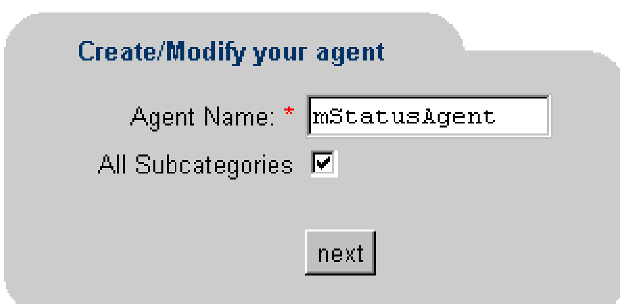
Editing an Agent

This procedure modifies an existing Agent.

1. Click on the document or folder icon to select it.
2. Click on the Agent menu.
    - Depending on whether you selected a document or folder, the Agents for <file name> or Agents for <folder name> screen displays:

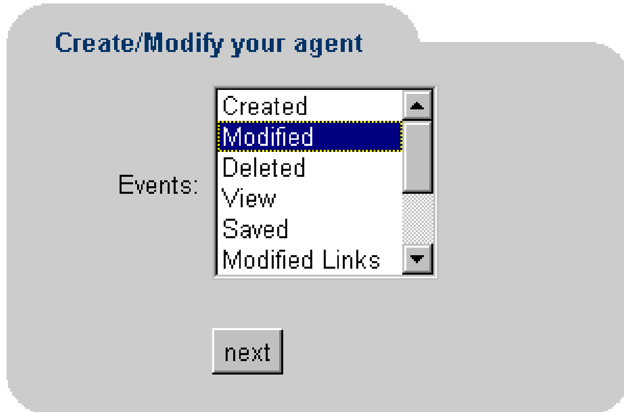


3. Click on the agent name link.
    - The Create/Modify Your Agent screen displays:

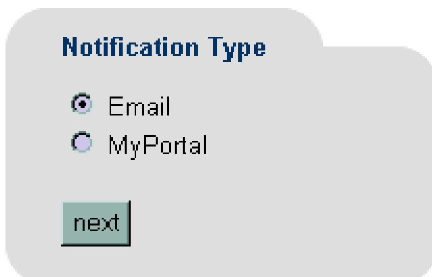


4. Enter changes if needed.
5. Click on Next.

- The Events field displays:



6. Enter changes if needed (use Shift+click to select items next to each other; Control+click to select items that are not next to each other).
7. Click on Next.
   - The Notification Type screen displays.



8. Enter changes if needed.
9. Click on Next.
   - The agent is modified and enabled.

Enabling/Disabling an Agent

This procedure enables or disables an existing Agent without deleting it, making it available on an intermittent, as-needed basis.

1. Click on the document or folder icon to select it.
2. Click on the Agent menu.

- Depending on whether you selected a document or folder, the Agents for <file name> or Agents for <folder name> screen displays:

3. Click in the check box to the left of the agent name.

4. Click on the Disable/Enable button.
   - A confirmation message displays:

5. Click on the OK button.
   - If the agent was previously enabled, the agent is disabled and the check mark is removed from the Enabled field of the Agents for <file name> or Agents for <folder name> screen:

   - If the agent was previously disabled, the agent is enabled and a check mark displays in the Enabled field of the Agents for <file name> or Agents for <folder name> screen.

Deleting an Agent

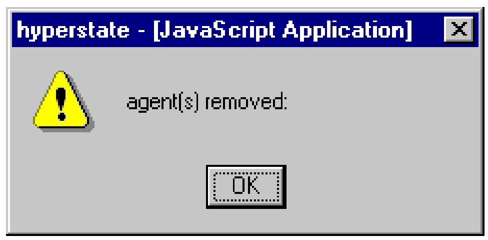
This procedure removes an existing agent.

1. Click on the document or folder icon to select it.
2. Click on the Agent menu.

- Depending on whether you selected a document or folder, the Agents for <file name> or Agents for <folder name> screen displays:

3. Click in the check box to the left of the agent name.

4. Click on the Delete button.
   - A confirmation message displays:

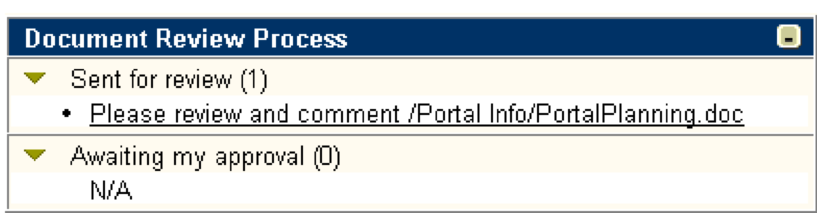


5. Click on the OK button.
   - The agent entry is removed from the Agents for <file name> or Agents for <folder name> screen:

Check Review Progress

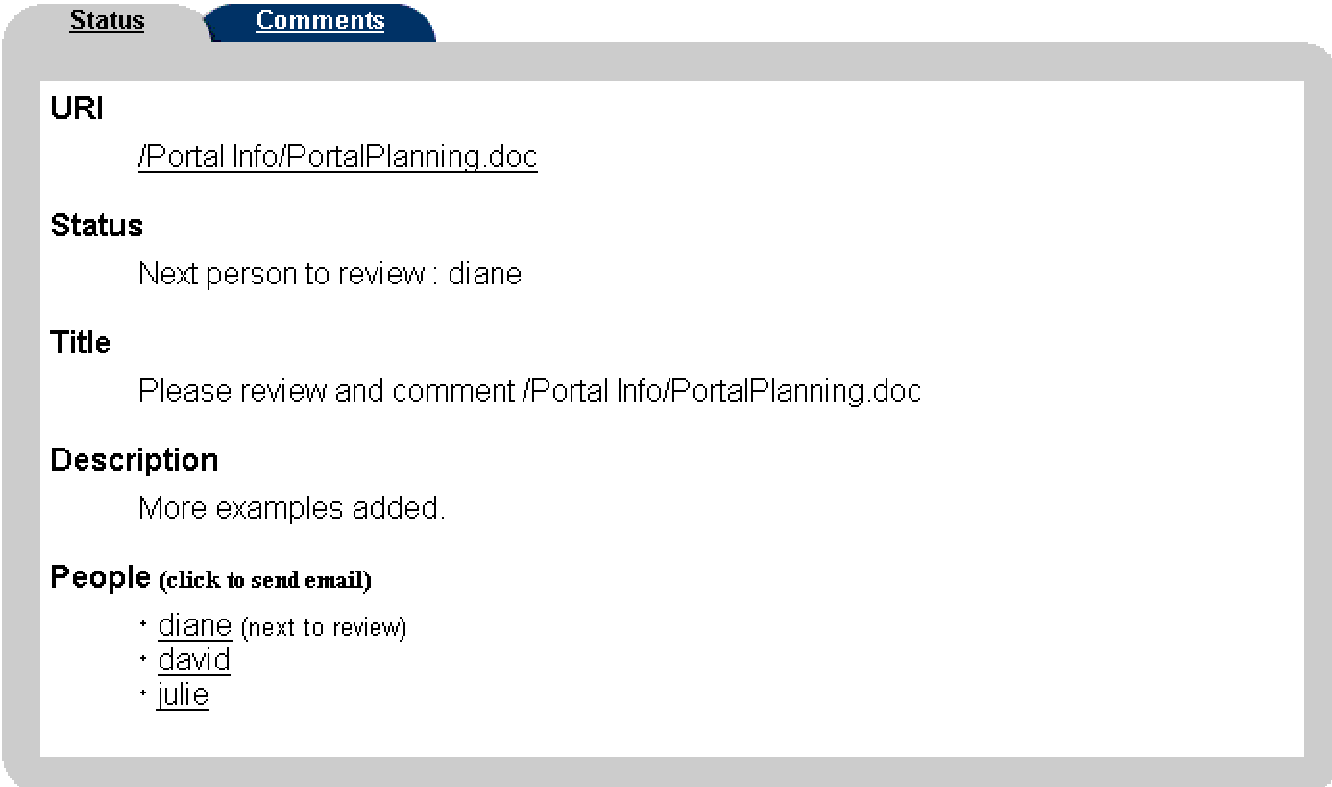
This procedure checks status on a document that has been sent for review.

1. Select My Portal from the Show drop-down list.
2. In the Sent for Review section of the Document Review Process window, locate the title of the review document you wish to check.



3. Click on the title link.

- The Status/Comments screen displays:



- The following table describes the fields in the Status tab:

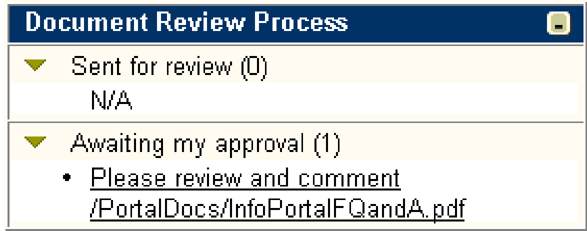
Field	Description
URI	Displays the filename and directory of the document in review as a link. Click on this link to view the document contents.
Status	Displays the User ID of the next person to review the document.
Title	Displays the message that reviewers see in their My Portal view when it is their turn to review the document. It is the same as the Title field in the Document Info/Review List screen (see “Start Review of a Document,” page 3.20).
Description	Displays your description or comments on the document before it was sent for review. It is the same as the description you entered in the Description field in the Document Info/Review List screen (see “Start Review of a Document,” page 3.20).
People	Displays the list of selected reviewers in User ID format. The IDs are also links to the reviewers’ respective email addresses. This is a convenience feature so you can send emails to the reviewers if you wish to give them additional information.

Reviewing a Document

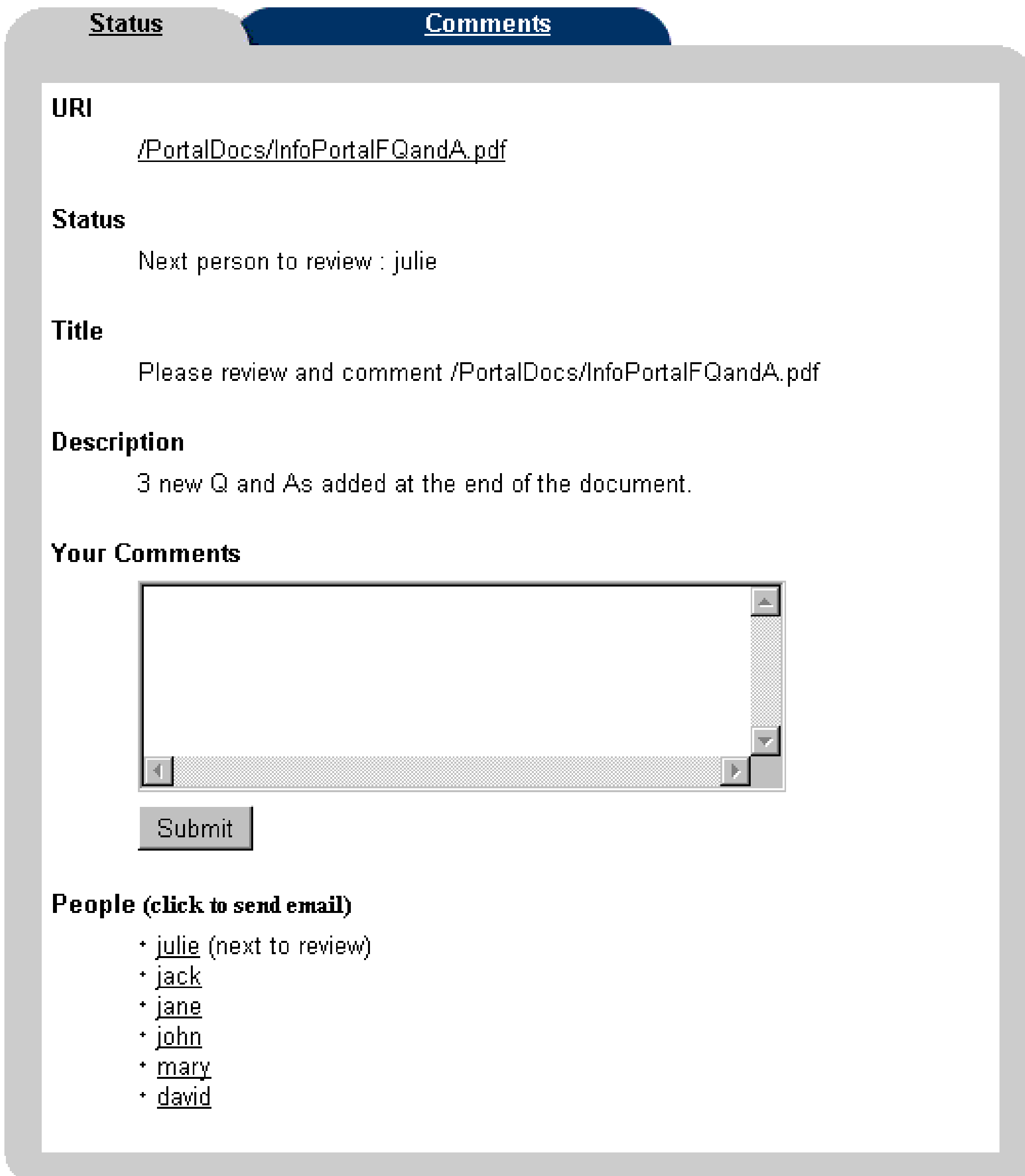
This procedure lets you look at the document that you were asked to review and enter comments that subsequent reviewers and the originator can view when it is their turn to review the document.

1. Select My Portal from the Show drop-down list.

2. In the Awaiting My Approval section of the Document Review Process window, locate the title of the document you wish to review.



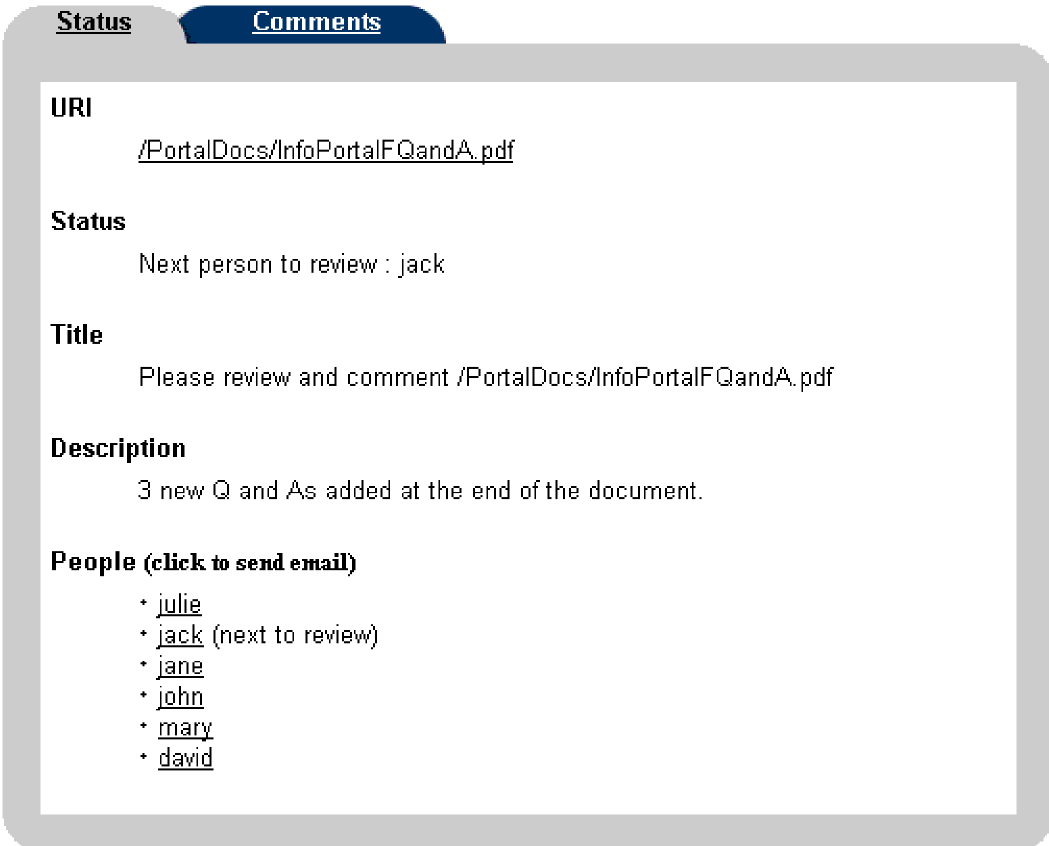
3. Click on the title link.
   - The Status/Comments screen displays:



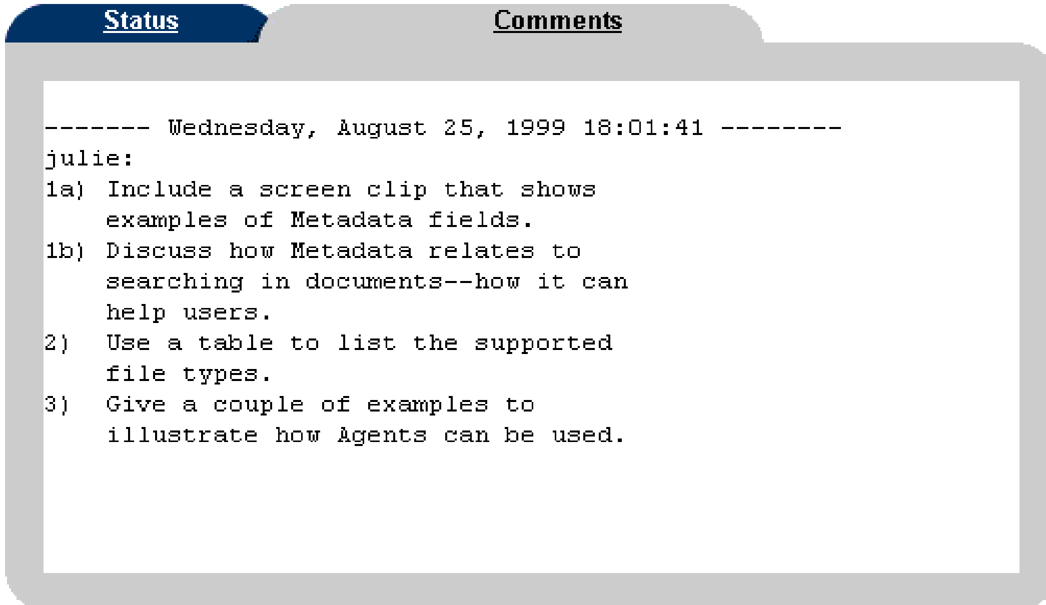
4. In the URI field, click on the link to view the document.
   - The document opens in a separate window.
5. If you need to get clarification, click on the appropriate link in the People field.

- This displays an email window with the person's email address in the Mailto field. You can email other reviewers or the document originator (the originator is always the last User ID listed in the People field).

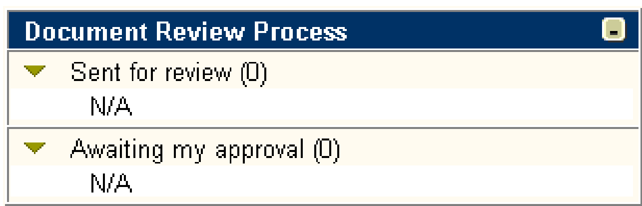
6. Enter your review comments in the Your Comments field of the Status tab.
7. Click on the Submit button.
   - The Status tab changes to show the next person to review the document.



- If you click on the Comments tab, it shows the text you entered in the Your Comments field:



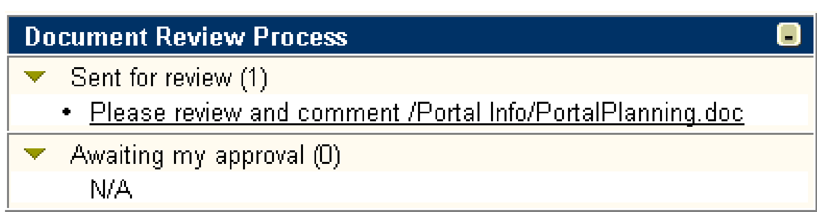
- In addition, your My Portal view no longer shows the link in the Awaiting My Approval section of the Document Process window:



End a Document Review

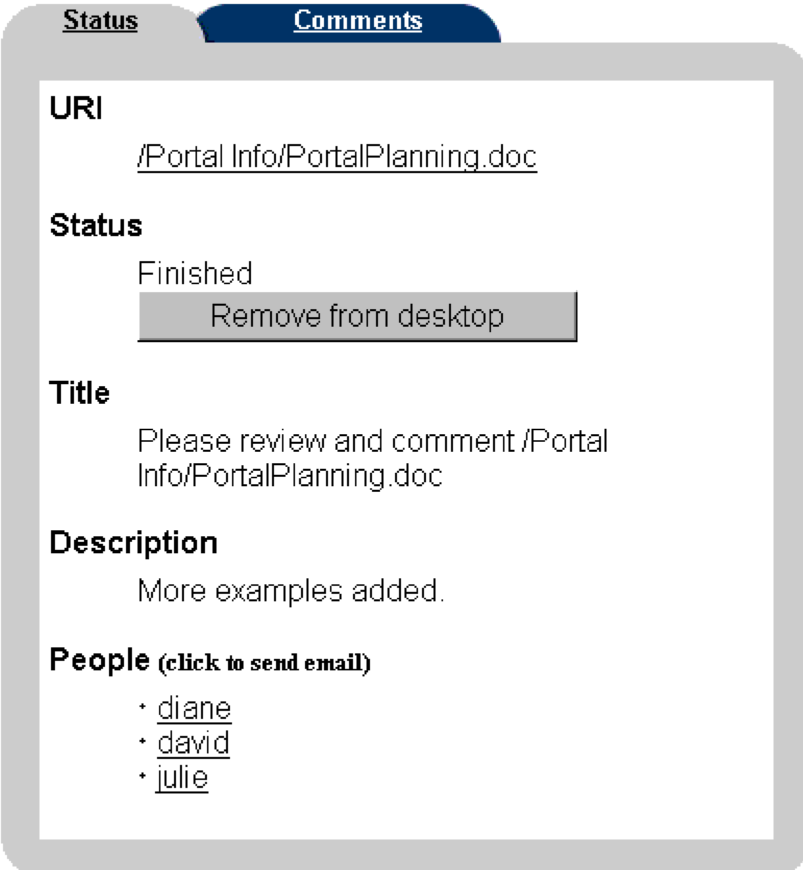
This procedure displays reviewer comments, then removes the link from the Sent for Review section of the Document Process window.

1. Select My Portal from the Show drop-down list.
2. In the Sent for Review section of the Document Review Process window, locate the title of the review document you wish to check.



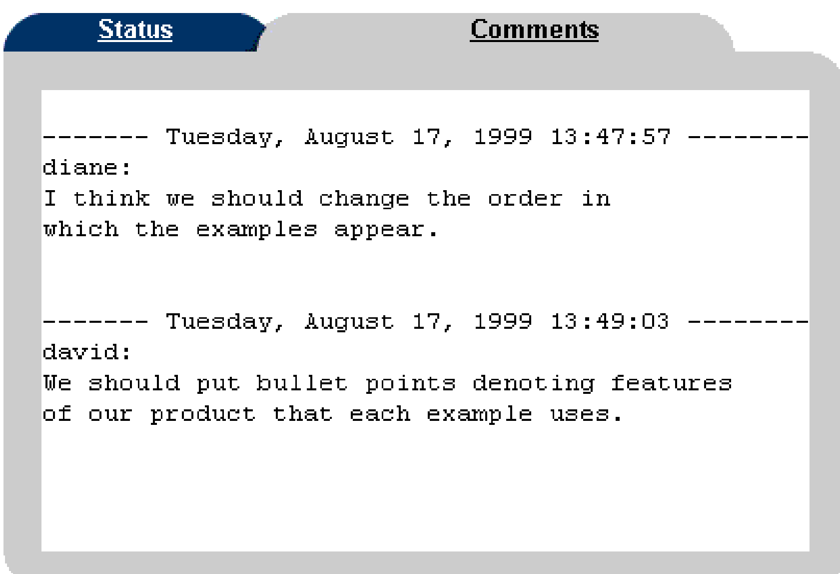
3. Click on the title link.

- The Status/Comments screen displays:



- When the review is complete (meaning all reviewers have submitted comments on the document), the Status field displays the message “Finished,” with a Remove From Desktop button below it. In addition, the message “next to review” does *not* display after anyone’s name in the People field.

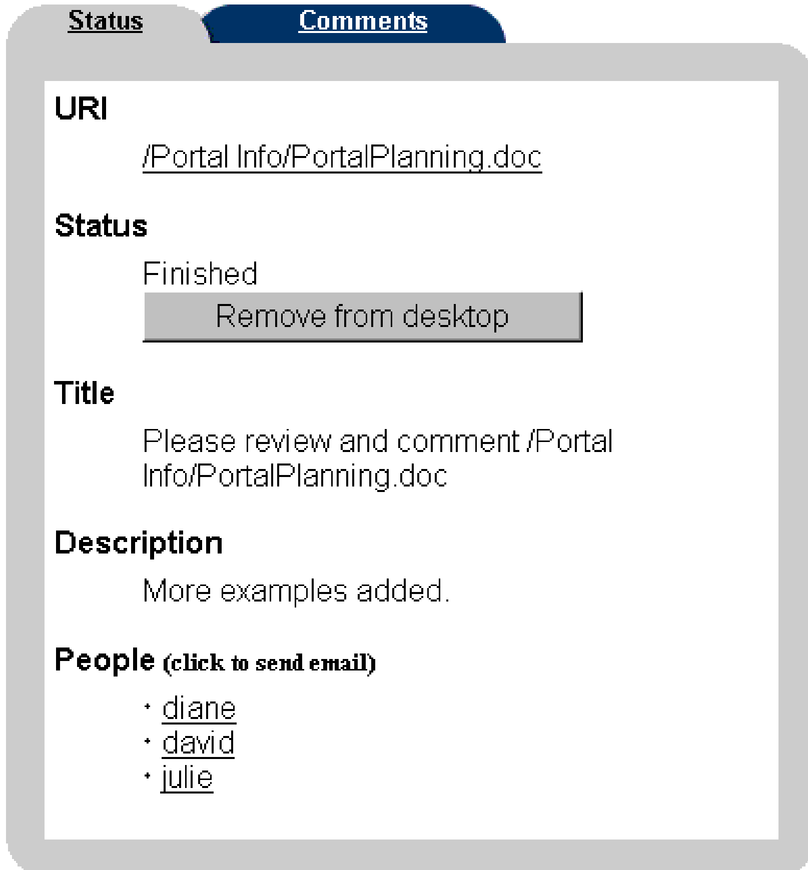
4. Click on the Comments tab to see all the comments.
5. The Comments tab displays reviewer comments:



Note

Reviewer comments are deleted when you end the review. The review is ended when you delete the link from the Sent for Review section of the Document Process Review in your My Portal view. Make sure you make the required changes to the document **before** you delete the link.

6. Copy the comments or incorporate the changes in the original document.
   - The comments will be deleted when you end the review.
7. Click on the Status tab.
   - The Status tab information displays again.



8. Click on the Remove From Desktop button.
   - A confirmation message displays:

Process has been removed from your desktop

   - All reviewer comments are deleted.
   - In addition, the link is removed from the Sent for Review section of the Document Review Process window in your My Portal view: